



# *MyLifeOrganized*

## User's Guide

## **MyLifeOrganized - Help**

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# Table of Contents

<b>Chapter I Introduction</b>	<b>5</b>
<b>Chapter II Installation</b>	<b>8</b>
1 System Requirements .....	8
2 Installing MyLifeOrganized .....	8
3 How To Register .....	8
Registering MLO to launch from a removable media .....	9
What if I have lost my Activation Code? .....	9
<b>Chapter III Getting Started</b>	<b>12</b>
1 The Main Window .....	12
2 The Basic Steps .....	16
<b>Chapter IV Working with MLO Data Files</b>	<b>20</b>
1 Create, Open, and Save MLO Files .....	20
2 Import/Export .....	20
3 Templates .....	21
4 Searching .....	22
5 Auto-Save .....	23
6 Advanced Backup of Data Files .....	23
<b>Chapter V Basic concepts: Outline, To-Do, View, Workspace</b>	<b>26</b>
1 Outliner .....	27
Default Outline Views .....	29
Adding a Task or Subtask .....	30
Deleting a Task or Subtask .....	31
Rearranging the Tasks and Subtasks .....	31
Performing Actions on Tasks .....	32
Zoom In and Zoom Out .....	34
Outline Navigation .....	34
Creating Links Between Tasks .....	35
Bookmarks .....	36
2 The To-Do List .....	37
Default To-Do List Views .....	37
3 Views .....	39
Manage Views .....	39
Task Filtering .....	41
Filter Controls .....	43
Task Grouping and Sorting .....	45
Understanding Task List Ordering .....	45

Computed-Score Priority .....	46
More Details on Computed-Score Priority .....	46
Columns .....	51
4 Workspace tabs .....	51

## Chapter VI Task properties 56

1 Assigning Contexts to a Task .....	56
2 Importance for parent .....	57
3 Urgency .....	57
4 Goal for week, month and year .....	58
5 Task To-Do List Visibility .....	58
6 Timing & Reminder .....	59
Start, Due date and Lead time .....	59
Recurrence .....	60
Reminder .....	62
7 Effort .....	63
Task Effort .....	63
Time Required for a Task .....	63
8 Dependencies .....	64
9 Project .....	65
10 Review .....	65
11 Task Format .....	66
12 Task Statistics .....	67
13 Flags .....	67
14 Starred .....	68
15 Advanced Task Properties .....	68

## Chapter VII Contexts 70

1 Creating and Deleting Contexts .....	70
2 Included Contexts .....	71
3 Context Hours .....	71
4 Context Options .....	71

## Chapter VIII Keyboard Shortcuts 74

## Chapter IX More Advanced Features 78

1 Automatic Formatting .....	78
2 Synchronization .....	79
Synchronization profiles .....	80
Adding a Synchronization Profile.....	80
Synchronizing Data Files .....	83
Editing a Synchronization Profile.....	85
Deleting a Synchronization Profile .....	85
Importing and Exporting Synchronization Profiles.....	85
Synchronization with MyLifeOrganized Cloud .....	86

Automatic sync with Cloud .....	87
<b>Synchronization with MLO BlackBerry .....</b>	<b>88</b>
<b>WiFi Synchronization .....</b>	<b>89</b>
<b>Collaboration .....</b>	<b>89</b>
Collaboration using MLO Cloud .....	90
Collaboration using sync to a hub file on LAN or FTP.....	90
<b>Synchronization for Portable Scenarios .....</b>	<b>91</b>
<b>Resolving Synchronization Conflicts .....</b>	<b>92</b>
<b>Outlook Sync User Manual .....</b>	<b>92</b>
1. Performing the Synchronization.....	93
2. Setting Up MLO for Outlook Synchronization.....	93
2.1 Outlook Folder .....	93
2.2 Tasks synchronization action.....	94
2.3 Advanced sync options.....	94
2.3.1 MLO Outlook Sync Presets.....	94
2.3.2 General Tab.....	95
2.3.3 Outlook Categories Tab .....	97
2.3.4 Priority Mapping Tab .....	99
2.3.5 User defined fields Tab .....	100
2.3.6 Tab Buttons .....	101
3. Notes and Troubleshooting.....	101
3.1 Changing MLO Outlook sync settings after sync operation .....	101
3.2 Changing Outlook folder after sync process.....	101
3.3 Recurring task in both places MLO and Outlook.....	101
3.4 Deletion of a task in Outlook which has subtasks in MLO.....	102
3.5. How backup and restore of your Outlook tasks could affect MLO sync .....	102
3.6 The MLO Sync Log .....	102
3.7 Misc Notes .....	102
<b>3 Input parsing .....</b>	<b>102</b>
<b>4 Drag'n'Drop .....</b>	<b>106</b>
<b>5 The Rapid Task Entry Dialog .....</b>	<b>107</b>
<b>6 Alternative complete .....</b>	<b>108</b>
<b>7 Printing and Reporting .....</b>	<b>108</b>
<b>8 Printing PocketMod .....</b>	<b>109</b>
<b>9 Archiving .....</b>	<b>110</b>
Archiving Manually .....	111
Archiving Using AutoArchive .....	111
<b>10 Using the Command Line .....</b>	<b>112</b>

## Chapter X Options 116

<b>1 Current MLO data file .....</b>	<b>116</b>
Appearance .....	116
Automatic Formatting .....	116
To-Do List Ordering Options .....	116
To-Do List Format .....	117
WiFi Synchronization .....	118
AutoArchive .....	118
Password protection .....	119
<b>2 General Application Options .....</b>	<b>119</b>

Themes and Formatting .....	119
Behavior .....	120
Auto-Save Files .....	121
The Rapid Task Entry Dialog .....	121
Backup .....	122
E-mail Account .....	123
Hot Keys .....	123
Troubleshooting .....	123
 <b>Chapter XI Technical Support</b>	 <b>126</b>
 <b>Chapter XII License Agreement</b>	 <b>128</b>
 <b>Chapter XIII Glossary</b>	 <b>132</b>
 <b>Index</b>	 <b>135</b>

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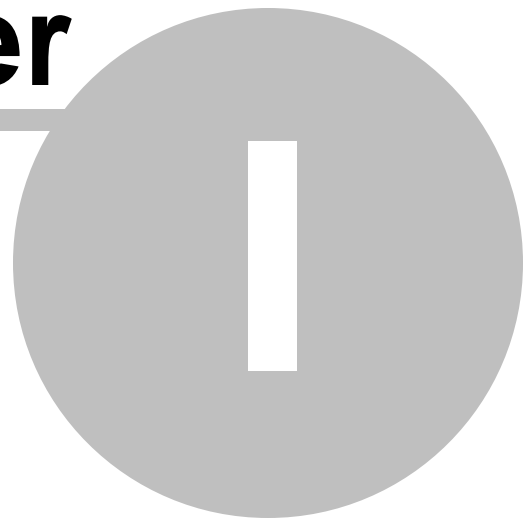
I am very grateful to my wife Katrin and my sons Michael and Ivan for their support and patience throughout the development of MLO, which has resulted in my coming home late on many days.





# Chapter

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# 1 Introduction

*"Before you can do anything, you have to do something first."*  
Murphy's Law

**MyLifeOrganized** (MLO) is a personal task outline that will help you organize your goals, projects and tasks into a tree. A to-do list of actions that require immediate attention will be generated automatically. This to-do list will be sorted in order of priority to keep you focused on your most important tasks. The to-do list ordering is based on sophisticated algorithms to determine optimum prioritization.

There are the following mobile clients for MyLifeOrganized: **Android**, **iPhone**, **iPad**.

There is the MyLifeOrganized [Cloud Sync](#) service allows you to synchronize data between different devices with MyLifeOrganized installed.

This manual mainly covers MyLifeOrganized for Windows and synchronization with other platforms. However many ideas from this manual may be applied to MyLifeOrganized on mobile platforms. More information may be found on our site: [www.MyLifeOrganized.net](http://www.MyLifeOrganized.net)

MLO can be synchronized with **Outlook**, and can import/export data from **MindManager**.

MLO will help you track your **personal projects** and achieve your most important goals.

Time management means planning and organizing your time in such a way that you accomplish your most important goals as quickly as possible. Yet many people work very hard with no idea of what their real goals are. If you do not have goals for yourself, you will be forever working to achieve the goals of someone else. Every day, many of us spend time on urgent but low priority tasks, while the most important tasks get put off to another day. Unfortunately, "another day" never seems to arrive. If you keep putting things off, you'll eventually wake up one day and realize life has passed you by. MLO encourages you to think and act differently -and doing things differently is the first step to digging yourself out of the procrastination rut.

The main idea of MLO is to help you stay focused on the activities which drive you to achieve your most important goals as quickly as possible. One of the key advantages of MyLifeOrganized is that, despite being a very powerful and sophisticated piece of software, it is extremely easy for even the most novice computer user. MLO will not replace your Calendar, Outlook or Excel, but it *will* help you organize your tasks into an outline, determine the most important ones, and generate a concrete and sequential list of specific actions to achieve your goals as quickly as possible. MLO is being actively developed, so join the MLO community and share your ideas: <http://groups.google.com/group/MyLifeOrganized>.

## Key Features

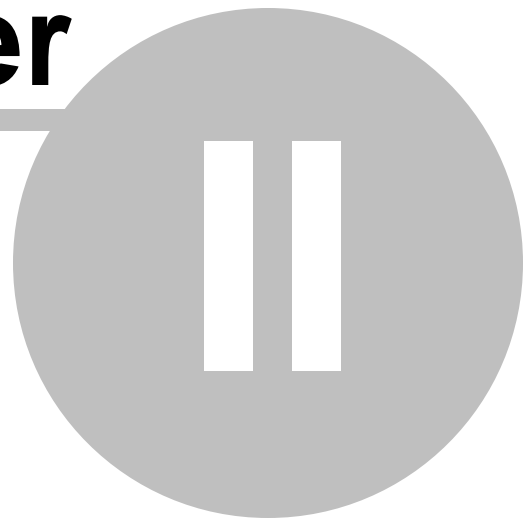
- Hierarchical to-do list manager (outliner)
- Generate to-do list (next actions) based on sophisticated algorithms to determine optimum prioritization
- Easy set and manage goals
- Complete the tasks in a specific order
- Simple personal projects tracking
- Dependencies
- Custom views
- Search-as-you-type

- Intuitive and customizable interface
- Extremely easy for everyday usage
- Cloud sync and collaboration
- Synchronization with MLO on mobile devices
- Smart synchronization with MS Outlook
- XML import/export that can be used to create project templates and exchange data with other applications including Excel and MindManager.
- Advanced printing functionality
- Easy one-click Excel export can be used to create and print any reports in MS Excel

[www.MyLifeOrganized.net](http://www.MyLifeOrganized.net)

# Chapter

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## 2 Installation

### 2.1 System Requirements

#### MyLifeOrganized - Windows System Requirements:

- Windows 8, Windows 7, Vista, XP, 2003
- 12 MB of disk space
- MS Outlook 2000+ if you want to sync MLO with Outlook

### 2.2 Installing MyLifeOrganized

#### How to install

1. If you downloaded the MLO installer, **MLO-Setup.exe**, just run it and follow the instructions. If you already have a previous version of MLO installed, just close the application before updating, and it will be updated with the new version automatically (no uninstall needed).
2. If you downloaded the zip file, **MLO.zip**, then no installation is needed. Simply unzip the files to a folder of your choice and run the application **mlo.exe**.

*Tip: MLO is specially designed to be able to run from USB flash drives. You can store your data files along with mlo.exe on your flash drive and run MLO directly from it.*

#### How to uninstall

1. If you used the MLO installer to install the program, then use "Add or Remove Programs" from your Windows Control Panel to completely uninstall MLO.
2. If you used the zip archive to install MLO, simply delete all the files from the folder you copied the application to.

### 2.3 How To Register

There are two ways to register MyLifeOrganized: you may register from within the application, or on our website.

#### To register using the MyLifeOrganized application

- 1) Select **Help > Registration...** from the application menu
- 2) In the **Registration** dialog, click the **buy online** link. You will be taken to the **Registration** web page.
- 3) Select the **Application Edition** you would like to buy a license for, and click the **Buy using share\*it** button on this web page.
- 4) Follow the instructions on the share\*it website to complete your **secure** order and receive an **Activation Code**.
- 5) Enter the Activation Code you receive into the appropriate text input in the MLO Registration dialog.

6) Click the **Register** button. Your application is now registered!

#### To register using our website

- 1) Click on the link below, select the MyLifeOrganized product, and follow the instructions.  
<http://www.mylifeorganized.net/shop/buy.htm>
- 2) Enter your Activation Code in the application, as described in steps 5 and 6 above.

#### See also

[What if I have lost my Activation Code](#)

[What if my Activation Code does not work?](#)

[How to register FAQ](#)

### 2.3.1 Registering MLO to launch from a removable media

#### How do I launch a registered copy of MyLifeOrganized from removable media (such as a USB Flash drive) ?

1. Register MyLifeOrganized using the Activation Code provided.
2. From the application menu, select Help > Registration, to open the Registration dialog.
3. In the Registration dialog, click "Export registration information to a file" and specify a folder where the file **mlo.keym** should be created.
4. Copy the following files to the same folder on your removable media:
  - mlo.exe - the main application
  - mlo.keym - the file containing the registration informationYou can also copy any \*.ml files that contain your data.
5. You can now run mlo.exe from the removable drive on any computer.

#### See also

[How To Register](#)

### 2.3.2 What if I have lost my Activation Code?

#### What if I have lost my Activation Code?

#### What if my Activation Code does not work with a new version of MyLifeOrganized?

Use our Online Activation Recovery Service to have a new Activation Code emailed to you:

<http://www.mylifeorganized.net/support/activator.htm>

#### How do I change the registration email?

#### What do I do if I have forgotten the e-mail address used when registering, or if the e-mail account is not valid anymore?

Use our Online Activation Recovery Service:

<http://www.mylifeorganized.net/support/activator.htm>

#### See also

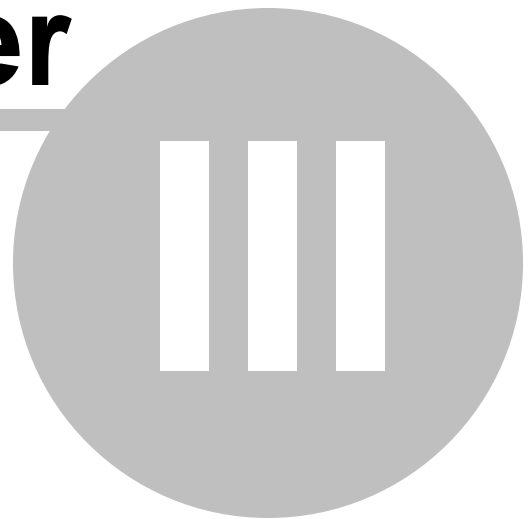
[How To Register](#)





# Chapter

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## 3 Getting Started

**MyLifeOrganized** (MLO) is a personal task outliner and to-do list manager that will help you organize your goals, projects, and tasks into a tree, and generate the to-do list of actions that require immediate attention. This to-do list will be sorted in order of priority to keep you focused on the most important tasks. The to-do list can be filtered, grouped, and ordered based on **sophisticated algorithms**, to determine optimum prioritization.

We recommend you start your discovery of MLO with the following topics:

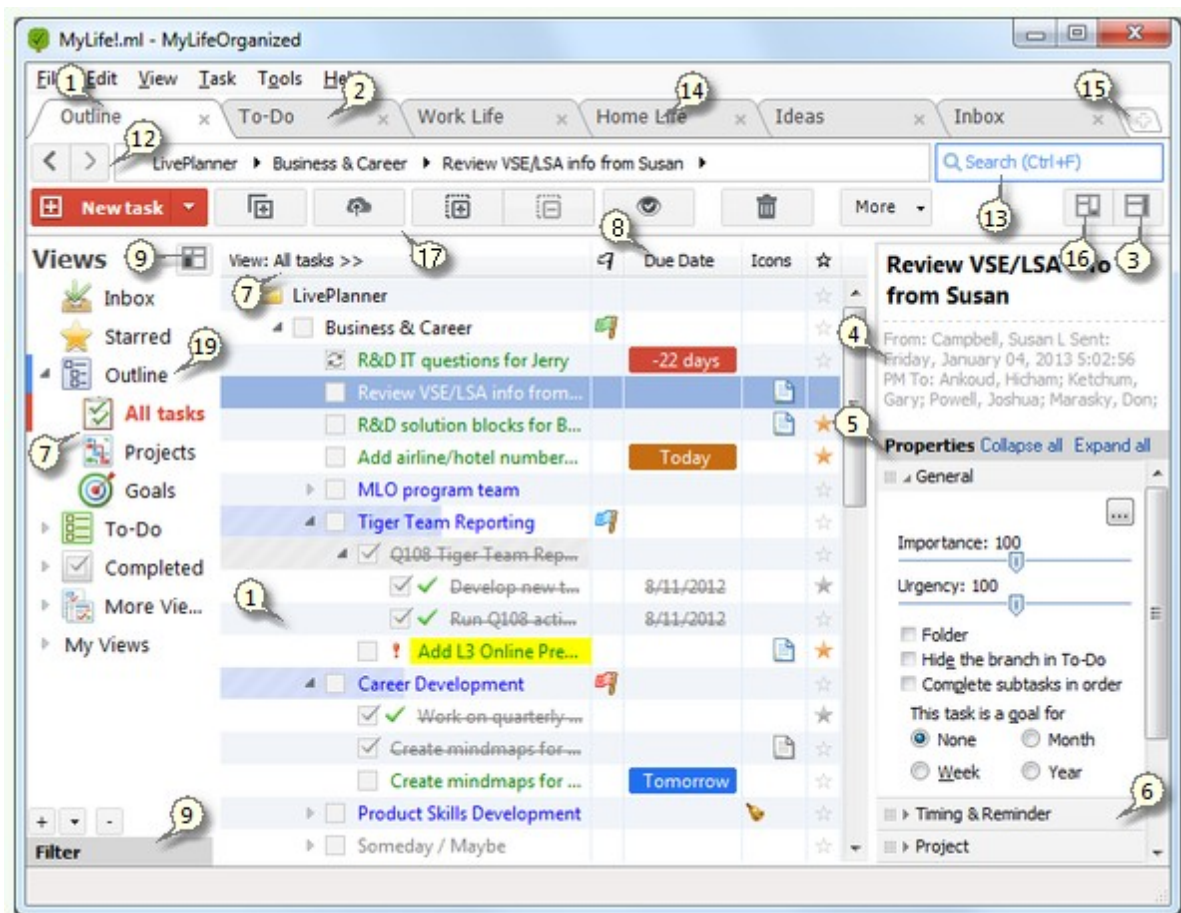
1. [The Main Window](#)
2. [The Basic Steps](#)
3. [Basic concepts: Outline, To-Do, View, Workspace](#)
4. [Contexts](#)
5. [Goals](#)
6. [Projects](#)

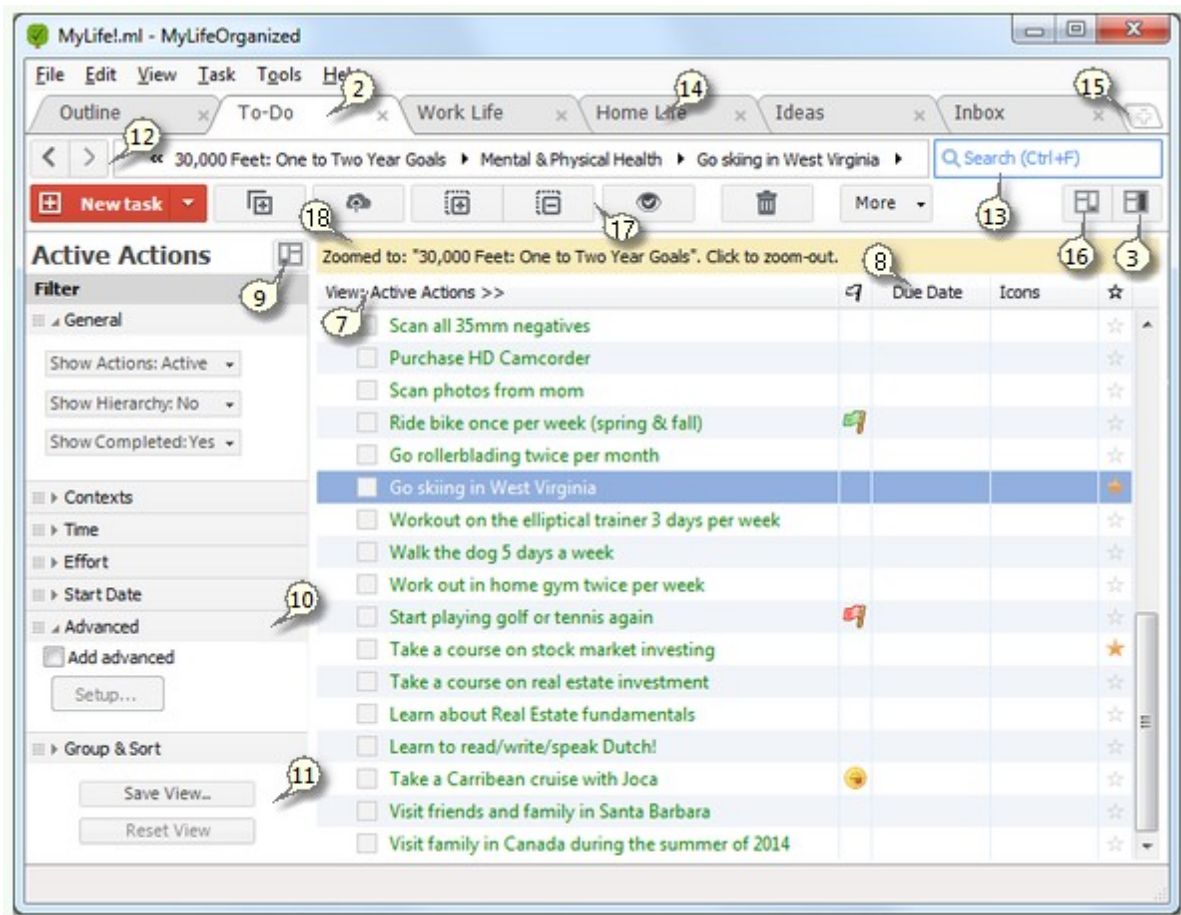
After you have reviewed these topics and understand the basic concepts of **MyLifeOrganized**, you can learn even more about the application in later topics of this help documentation.

You can also download the printable version of [MyLifeOrganized User's Guide](#) from our web site.

### 3.1 The Main Window

Here is a brief overview of each element in the **MyLifeOrganized** main window.





### 1. Task Outline

The [Task Outline](#) contains your folders, goals, projects, tasks, and subtasks in a hierarchical structure.

### 2. To-Do List

After you have entered all your goals, projects, and tasks into the [Outline](#), MLO can display only those tasks that require immediate attention. These tasks are placed in the [To-Do list](#). The To-Do list is a simple list of actions which can be grouped by contexts or other task properties. See more information about [Outline, To-Do, Views and Workspaces](#).

### 3. Show/Hide Task Properties

This button opens and closes the task properties pane and notes window.

### 4. Task Notes or Notes Preview

The task notes section contains a plain text editor to add notes to a task. There are two modes to edit notes: 1) Notes preview with text edit in full panel 2) Edit notes without preview. To switch modes right click on Properties pane, select Configure... and click "Edit notes in full panel". The task notes editor supports hyperlinks and links to other tasks.

### 5. Properties Pane

The Task Properties Pane contains many parameters that can be set for each task. It is here, for example, that **Contexts** can be [assigned](#) to the task, as well as other parameters, such as [Task Importance](#) or [Due Date](#).

## 6. Property Sections

Task properties are grouped into Property Sections. Click on a Property Section to expand or collapse it. You can also use [Keyboard Shortcuts](#) for quick access to the Property Sections. Which parameters appear in each section can be set in the Options dialog box, on the [Appearance](#) page.

## 7. Views

All tasks in MyLifeOrganized can be filtered, sorted and grouped in various ways, and the filtering, sorting and grouping rules stored as "views". To switch to another view, use one of the ways below:

- 1) Select a view in the left panel with Views tree
- 2) Click on the column where the current view name is displayed and select other view in the list opened

## 8. Columns

You can choose which [columns](#) to display in the current View. Right-click on the column header to see the full list of columns. The columns configuration is stored for each view.

## 9. Show/Hide filter for current view

Click to show or hide the filter pane with filtering, sorting and grouping rules for the current view.

## 10. Filter Pane Sections

The filtering properties are grouped into Filter Sections and allow creating various custom [filters](#), groupings, and sorting rules for the task list.

## 11. Manage Views Pane

Any filtering and grouping you define can be saved as a [View](#). You can also reset settings to the previous state on this panel.

*Tip: To manage views (rearrange, rename, delete, etc.), you can use the Views Pane. Just right click on a View in the Views pane and select a command from the menu. Drag and drop views in the Views pane to rearrange them.*

## 12. Navigation

While you are browsing through the outline of your tasks, you can use various navigation buttons to move back, forward or select different levels. The full path to the selected task is displayed under tabs. Click on the full path to select another level. You can also use [Workspaces \(tabs\)](#), [Task Links](#), [Bookmarks](#) and [Keyboard Shortcuts](#) to speed up your outline navigation.

## 13. Search tasks

MyLifeOrganized includes a very fast full-text search feature.

## 14. Workspace tabs

[Workspace tabs](#) are used to switch quickly to a different way to see your tasks. For example, in one tab you can focus on a current project, while in a second tab you view your household chores list. In a third tab, you might choose to manage your Inbox. And you can switch between these Workspaces with a single click!

When you create new MyLifeOrganized file there are two default tabs are created: Outline (with All Tasks view selected to see all your tasks in hierarchical view) and To-Do (with Active Actions view selected to see only active tasks as plain list). You can create additional Workspaces according to your way to manage tasks.

## 15. Create new workspace (tab)

Click this button to create new Workspace (tab)

## 16. Edit notes in full panel

Click to hide task properties to edit the notes in full panel

### 17. Toolbar

### 18. Zoom

Displayed the task name of the [Zoom](#) you set.

### 19. View group

Views can be organized in groups. When you click a group in the Views pane the last used View from this group is selected. The view groups are highlighted with blue line and the View inside this group is selected with red line and red font. Expand the View group to see what is the actual view was selected when you select this group.

*Tip: You can temporally hide tabs, views pane, toolbar and task properties to see your task list full screen. Just select View->Full screen (F12).*

#### See also

[The Basic Steps](#)

[Basic concepts: Outline, To-Do, View, Workspace](#)

[The Outliner](#)

[The To Do List](#)

[Views](#)

[Appearance](#)

## 3.2 The Basic Steps

Here are four basic steps to help you start using **MyLifeOrganized**.

### 1. Outline your tasks

Use the MLO [Outliner](#) to organize your goals, projects, and tasks into a tree. Start by entering what you would like to accomplish. If a task is large, break it down into its component elements, by creating sub-tasks underneath it. If these components are themselves large, break them down further into their own sub-tasks. Mark tasks as Projects by checking "This is a project" in the task's properties (under the Project section of the properties pane). Mark tasks as Goals by setting the "This tasks is a goal for" property of the task (under the general section of the properties pane). For more information on creating tasks, see [Adding a Task or Subtask](#).

### 2. Ask yourself what is important

For each task, you can specify its importance to it's parent task, to the goal the task will contribute to. In other To-Do programs, when you set the priority of a task, you must set an absolute priority in relation to all other tasks in your list. This is very difficult to determine sometimes! In MLO, the process of setting priorities is made easier: you only consider how important each task is to completing its parent task or project. If you later change the importance of a project, all of it's sub-tasks will be reprioritized accordingly, without you having to change the importance sliders for those subtasks individually. See the [Importance for parent](#) topic for more details.

### 3. Assign Contexts to each task

Some tasks in your list can be completed only in certain Contexts or situations. For example, say the

task "Buy new mouse" cannot be completed unless you are in a computer store. Thus, you may want to [create a new Context](#) named "Computer store", or "Shopping", and [assign](#) this Context to the task. Later on, you can filter or group the To-Do list by assigned Contexts.

A Context can [include other Contexts](#), so it is easy to construct a realistic model of your everyday Contexts or situations. For example, the Context "Computer store" could be included by the more general context "Shopping", so you can either bring up all shopping tasks, or bring up tasks only for the Computer store.

Another way to think of Contexts is as categories for the tasks. Several contexts can be assigned for a task. The contexts could be also [open or closed](#).

#### **4. View the automatically generated To-Do list**

After you have entered your goals, projects, and tasks into the [Outliner](#), MLO will display only those tasks that are ready for your immediate attention. These tasks are placed in the To-Do list -a simple list of actions. In the default "Active Actions" view, tasks that have uncompleted subtasks are not shown in the To-Do list, and scheduled tasks appear in the list only at appropriate times. See the [To-Do List](#) topic for more details on how the to-do list is created.

The To-Do list can be [sorted](#) by priority so that you stay focused on what is really important to you, separate importance from urgency, and overcome procrastination.

The tasks in the To-Do List can also be [filtered](#) based on different parameters, such as context, amount of time you have available right now, etc.

The tasks on the To-Do list can also be grouped by various properties. It is easy to create a customized To-Do List View that is filtered, sorted, and grouped according to your needs.

Each time you complete a task, the to-do list is regenerated, properly updated and ordered.

#### **See also**

[Getting Started](#)

[Basic concepts: Outline, To-Do, View, Workspace](#)

[Timing & Reminder](#)

[Setting Goals](#)

[Personal Projects Tracking](#)





# **Chapter**

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**IV**

## 4 Working with MLO Data Files

### 4.1 Create, Open, and Save MLO Files

MLO stores your data in a single binary file. The default file extension for MLO data files is \*.ml

**To create a new MLO file:**

1. Select **File > New...**
2. Choose to create a blank file or choose a [template](#) to start with. (Template files have a \*.mlt file extension.)
3. The current file will be closed and the new file created.

**To save an MLO file:**

1. Select **File > Save**

**Note:** Each time you save your data file a backup file is created, named **<YourFileName>.ml.bak**. (The file will be named slightly differently if you chose "Keep last N backups" in the [advanced backup](#) settings.) Another backup is also created right before every Outlook sync, named **<YourFileName>.ml.sync.bak**

**Tip:** To save the file under a different name, select **File > Save as...** and enter a new file name.

**Note:** By selecting different file types in the **File > Save as...** dialog, you can export the entire outline to different formats.

**To open an MLO file:**

1. Select **File > Open...**
2. Chose the type of the file you want to open.
3. Browse to and select the file you want to open.
4. Click the Open button.

**Note:** By selecting different file types in the **File > Open** dialog, you can import data in different formats.

**Note:** To recover from a backup file, simply open the backup file in the MyLifeOrganized application.

**See also**

[Import/Export](#)

[Auto-Save Options](#)

[Advanced Backup Options](#)

### 4.2 Import/Export

Import and Export commands are used to exchange data between MyLifeOrganized and other applications. When exporting, you are given a choice to export only the selected branch (a task and all of its subtasks), or the entire outline. When importing, you can import into the selected task, or into the root of the outline.

Import and Export is accessed with menu **File > Import** or **Export**.

### Export Formats

MyLifeOrganized can export to the following formats:

- 1) MyLifeOrganized XML Document (\*.xml)
- 2) MyLifeOrganized Template (\*.mlt)
- 3) Tab-delimited Text Document (\*.tab)
- 4) **Excel** XML Document (\*.xml)
- 5) **MindManager** XML Document (\*.xml)

### Import Formats

MyLifeOrganized can import from the following formats:

- 1) MyLifeOrganized XML Document (\*.xml)
- 2) MyLifeOrganized Template (\*.mlt)
- 3) Tab-delimited Text Document (\*.tab)
- 4) **MindManager** XML document (\*.xml)

XML and tab-delimited text are standard formats supported by a variety of applications.

**Note:** You can also export or import the entire outline by selecting **File > Save as...** or **File > Open...** respectively. You just need to select the type of file you would like to export to, or import from.

**Tip:** By exporting to an **Excel XML document**, you can use the power of Excel's reporting to create all kinds of reports about your projects and tasks. For example you can use Excel's Autofilter to report on all the tasks you completed last week and print out the report.

**Tip:** Export can be used to duplicate tasks and entire projects, and creating reusable templates that can be imported into your main file any time needed.

**Tip:** You can use XSLT (<http://www.w3.org/TR/xslt>), a relatively easy language, to apply further magic on your xml exports (outside of MLO), such as conversion to other file formats or creating custom reports.

### See also

[Create, Open, and Save MLO Files](#)  
[Templates](#)

## 4.3 Templates

Templates are used to store predefined content and structure so that you can reuse it later when creating new MLO data files.

### How to create a new data file based on a template

1. Select **File > New...**
2. Choose **Create from existing template**
3. In the **File Dialog**, select the template you would like to use.

4. Click the **Open** button

**Note:** Each time you create a data file based on a template, MLO processes it to "catch-up" all the recurring tasks to the current date.

**Tip:** One special template, called the "MyLife Organized - Demo.mlt", can be used to create a demo outline with some tips and examples of how to use MLO.

**Tip:** You can also [import](#) data from a template into a selected task of the current data file.

#### How to create new template

1. Open or create a data file that you would like to store as a template to reuse later.
2. Click **File > Save as...**
3. In the **Save as type** list select **MyLifeOrganized Template (\*.mlt)**
4. Enter a file name
5. Click **Save**

**Tip:** You can use [export](#) to create a template based on only the selected branch of the current outline.

#### See also

[Create, Open and Save MLO Files](#)  
[Import/Export](#)

## 4.4 Searching

You can locate tasks by searching all the task captions and/or task notes in your MLO data file. The search feature is very fast and provides search-as-you-type: it immediately displays search results as you type the text you want to find.

#### To search for text in the task captions and/or task notes:

1. Click into the **Search** text box in the upper-right corner of the **MyLifeOrganized** window.
2. In the search box, type the text you want to find.  
 The search results are displayed in a pane at the top of the window.

**Tip:** MLO implements Google-like search, which means that it can search for any combination of typed words, or can search for a specific phrase if quotation marks are placed around the phrase.

**Tip:** After entering your search text, press **Enter** to change focus to the search results and jump to the first result.

#### Notes:

- There is an option in the Search panel to search in **All Tasks**, in **All Except Completed**, and in only the **Current View**.
- To narrow down the list of search results, use the **Search in captions** and **Search in notes** check boxes above the search results pane. For

example, to search only in the task captions of open tasks, select the **Search in captions** check box, clear the **Search in notes** check box and select **All Except Completed**.

- If more than one match is found in the task notes, a plus sign is displayed next to the task caption. Click the plus sign to display additional rows. The number of rows corresponds to the number of matches found in **Task Notes**. Click one of these rows to see the corresponding matching text highlighted in the **Task Notes**.
  - You can sort the search results by any column in the search results pane. Click the name of the column that you want to use for the sort order. To reverse the direction of the sort (ascending or descending), click the name of the column again.
3. Select a row in the search results pane.  
The matching task name is highlighted on the current tab. If the matching text is found in the task notes, it is highlighted on the **Task Notes**.

**Note:** If task is not found in the current tab MLO will continue search in the first tab. If task is not found in the first tab the new tab is created without filter (to show all tasks there) and the task is found in this new tab.

**Tip:** To change focus to the Task list, press Enter.

4. To hide the search results pane, click **Close** in the upper-right of the search results pane or press Esc when focus is in the Search Panel.

## 4.5 Auto-Save

By default MLO automatically saves your data file. However you can set manual saving mode.

There are two options:

- 1) Save all changes automatically
- 2) User manually saves the changes

**To select an Auto-Save option:**

1. Select **Tools > Options...**
2. Select **Autosave files** page
3. Select the Auto-Save option you need.

**See also**

[Option - Auto-Save Files](#)

## 4.6 Advanced Backup of Data Files

Advanced Backup stores backup copies of your MLO data files on each save. Should you lose your data, you can open a backup file or use [import/export](#) to restore your data.

MLO can retain daily, weekly, and monthly backup files, as well as the last N copies of your data files.

Advanced Backup is not enabled by default.

**To configure Advanced Backup settings:**

1. Select **Tools > Options...**
2. Select the **Backup** section.
3. Select the backup settings you need. (See [backup settings](#) for more details.)

***Tip:** To recover from a backup, simply open the backup data file (\*.bak) in MyLifeOrganized application (menu: File >Open)*

**See also**

[Backup Settings](#)

[Archiving](#)

# Chapter

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V

## 5 Basic concepts: Outline, To-Do, View, Workspace

Below you can find the description of the main concepts of MyLifeOrganized application and how they work together.

### Outline

Outline is the list of Goals, Projects, and other tasks displayed in hierarchy that shows the relationships of subtasks to their respective parents. The Outline is used to organize your tasks. You can view your Outline using different views. When you create a new data file, MyLifeOrganized creates several [default Outline views](#) for you. The new tab *Outline* is also created. When you click on this tab the Outline view *All tasks* is selected.

**Note:** *The Outline is just a definition of filtered tasks (views) presented hierarchically. You can create your own Outline view by [creating](#) new custom hierarchical view.*

[More details about Outline.](#)

### The To-Do List

After you have added all your goals, projects, tasks and subtasks to the [Outline](#), MLO can display only those tasks which require immediate attention and place them in the To-Do List. This is a simple non-hierarchical list of actions selected from the entire Outline. This list can be sorted and grouped using different parameters. You can view your To-Do list using different views. When you create a new data file, MyLifeOrganized creates several [default To-Do list views](#) for you. The new tab *To-Do* is also created. When you click on this tab the To-Do view *Active Actions* is selected.

**Note:** *The To-Do list is just a definition of filtered tasks (views) presented in a plain (non-hierarchical) list. You can create your own To-Do lists by [creating](#) non-hierarchical views.*

[More details about To-Do list.](#)

### View

View is a particular way of displaying a filtered, sorted and grouped tasks. By default MyLifeOrganized creates several default views such as [Outline](#) views (hierarchical) and [To-Do list](#) views (non-hierarchical). Views are displayed in the left Views pane so that you can select a view with a single click.

**Note:** *Views can be organized into the groups. When you click a group in the Views pane the last used View from this group is selected. The view groups are highlighted with blue line and the View inside this group is selected with red line and red font. Expand the View group to see what is the actual view was selected when you selected this group. By default the following groups of views are created in MLO: Outline, To-Do, Completed, More Views.*

[More details about views.](#)

### Workspaces (tabs)

There are tabs on the top of the MyLifeOrganized application we call Workspaces. The Workspaces are used to store and quick access the particular configuration for the selected view, additional filters, [zoom](#), selected tasks etc. The Workspaces can show different parts of the same data files in different views. For example, in one tab you can work on a current project in the other – view a small household chores and the third tab -handle the Inbox. And you can switch between these Workspaces with a single click!



When you create new data file, MyLifeOrganized creates two default Workspaces for you: Outline and To-Do so that you can quickly switch between hierarchy in All Tasks view on Outline tab to the plain list in Active Actions view on To-Do tab.

When you select a view inside Workspace or change the filter, you actually change the configuration of the current Workspace. When you click other Workspace you will see other configuration in it. When you return back to the first Workspace your changes for this Workspace will be still there. If you want to propagate the changes to filtering, sorting and grouping in one Workspace to other Workspaces, you must first save these changes into a View. This way all the Workspaces which are using this View in unchanged state will receive the new settings.

***Note:** Some parameters like Selection and Zoom may be configured to sync with the first tab. This is needed, for example, when you want to see the place in the Outline of the task selected in the To-Do list. To configure the Workspace right click on it and select Set up workspace...*

[More details about Workspaces.](#)

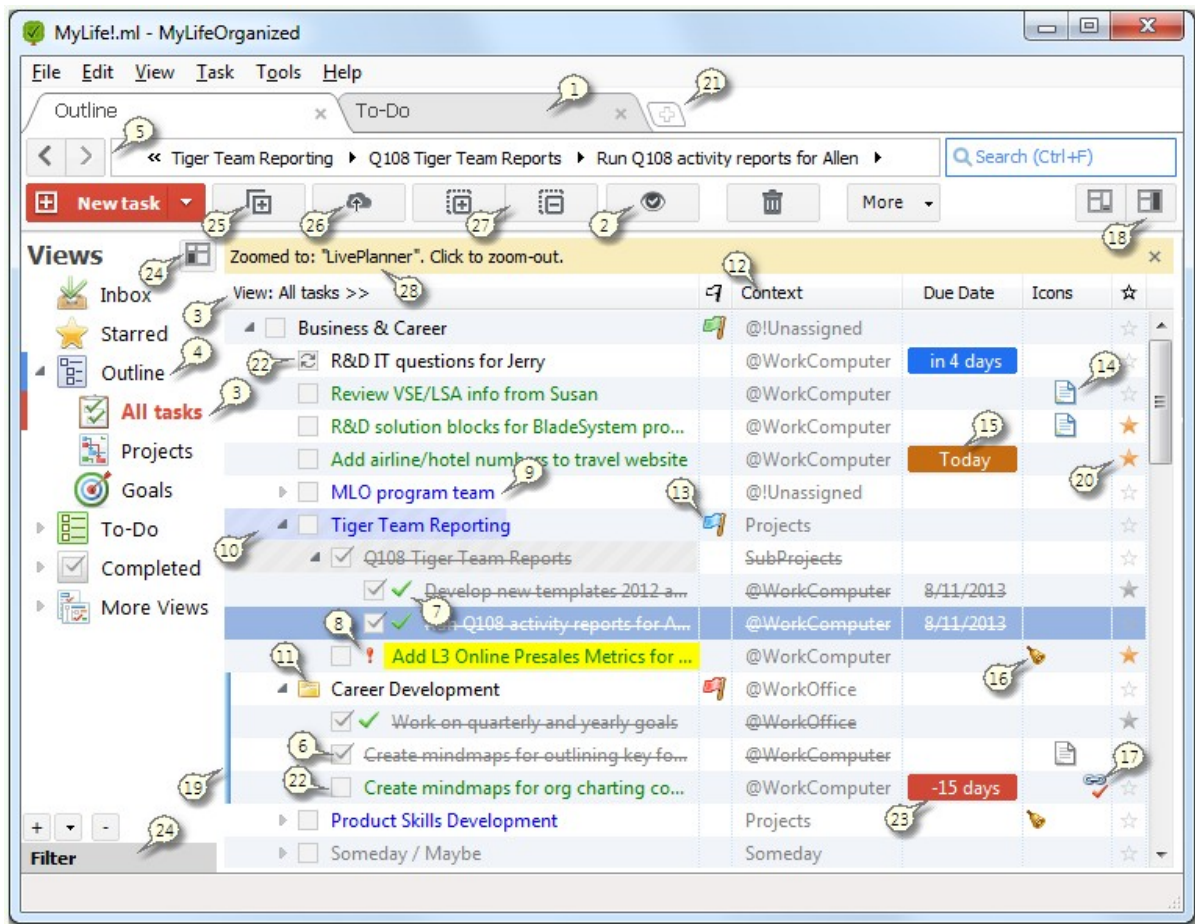
**See also**

[The Basic Steps](#)

[Zoom In and Zoom Out](#)

## 5.1 Outliner

The Outliner is where you organize your tasks. Here is an overview of its many features.



1. [Switch from Outline to To-Do list](#)
2. Hide completed tasks
3. [Current view](#). Click to change the view
4. [View group](#)
5. [Navigation](#) buttons and full path to the selected task
6. Completed task
7. Completed [Goal](#)
8. [Weekly goal](#)
9. This task is a [Project](#)
10. Project completion progress bar
11. [Folder](#)
12. [Context](#) column
13. [Flag](#)
14. This task has notes
15. [Due date](#) set for this task
16. [Reminder](#) set for this task
17. [Dependency](#) set for this task
18. Open [task properties pane](#)
19. [Side color bar](#)
20. [Starred task](#)
21. Add new [Workspace](#)
22. [Active Action](#)
23. Overdue task

24. Open filter setup pane
25. Add subtask
26. Cloud sync (there are local modifications now)
27. [Zoom in / Zoom out](#)
28. Current [zoom](#)

An Outline is a hierarchical list of [Goals](#), [Projects](#), and other [Tasks](#) displayed in a way that shows the tasks relationships, including [Parent Tasks](#) and their [Subtasks](#). This hierarchy is sometimes referred to as a tree, with root items (top-level items, or items at the top of the hierarchy), branches, and leaves (tasks that have no subtasks). If you have a list of goals that you wish to work on, you can first enter these goals at the top level of the outline. Then, for each goal, you can enter sub-projects and subtasks that will help you to accomplish that goal.

If you prefer to concentrate on projects and not goals, you can simply enter your projects, and then, for each project, enter its subtasks.

In addition to entering new tasks, you can also edit or delete existing tasks in the Outline.

If you have enabled the **Properties Pane** in the **View** menu, properties and notes pertaining to the selected tasks are displayed on the right side of the [main window](#), and you can set individual properties for the selected tasks there.

Goals, projects, and tasks that you enter in the outline are then listed in the [To-Do List](#) based on their position in the hierarchy and on the properties that you assign to them.

To make it easier to view your uncompleted tasks, without being distracted by those that are already done, there is a button to **hide completed tasks** from the display. You can hide all completed tasks or completed tasks which are older than a specified time. There is a refresh option (F5), to update the display with all recent changes. You can also select from a list of [Outline views](#) that will display all your tasks, only your goals, only your projects etc.

If you want to view only subtasks of a single goal, project, or parent task, you can [zoom in](#) to that task and all other tasks will be removed from the display, so that you can concentrate on the branch at hand.

#### See also

[Creating Tasks and Subtasks](#)  
[Rearranging the Outline](#)  
[Outline Navigation](#)  
[Actions on Tasks](#)  
[Zoom In and Zoom Out](#)  
[Views](#)

### 5.1.1 Default Outline Views

You can view tasks in the **Outline** in different ways, called Views.

View name	View description
All Tasks	Shows all tasks and subtasks, displayed the way you entered them.

<b>Projects</b>	Shows tasks with property <a href="#">Project</a> checked with their subtasks.
<b>Goals</b>	Shows tasks set as <a href="#">Goals</a> with their subtasks. (you can assign this property from the <b>General</b> section of the task <b>Properties Pane</b> ).
<b>Review</b>	Shows all tasks (and their subtasks) with property Next Review set for today or for the past. This view is used to perform periodical review of your projects and tasks. Once the project is reviewed mark it by command "Mark Reviewed" to move the review on next date.

#### To change the View from views pane:

1. Double click **Outline** in the left panel with views to expand all Outline views.
2. Select the view you need.

#### To change the View from menu:

1. Click the **Views: <View Name>** header to open the pop-up menu containing a list of views.
2. From the pop-up menu, select the view you need.

*Tip:* You can create your [custom views](#) using filtering, grouping and sorting.

*Tip:* You can use the **Alt+V** shortcut to open the view pop-up menu.

*Tip:* To save the space on the screen you can hide task views pane by selecting menu: View->Task views pane. (Alt-F1) .

#### See also

[Outliner](#)

[Workspace tabs](#)

[Goals Setting](#)

[Projects Tracking](#)

[Zoom In and Zoom Out](#)

## 5.1.2 Adding a Task or Subtask

A task can be added below the selected task, or as a child of the selected task.

#### To add a task:

1. On the **Task** menu, click **New task**, and type a task name.

*Tip:* You can also press the **Insert key** [shortcut](#) or use **New task** toolbar button.

#### To add a subtask:

1. Click the task you want to add a subtask to.
2. On the **Task** menu, click **New subtask**, and type a subtask name.

*Tip:* You can also press **Alt+Insert** as a [shortcut](#) or use the toolbar button.

#### See also

[Actions on Tasks](#)

[Outliner](#)

### 5.1.3 Deleting a Task or Subtask

#### To delete a task or subtask:

1. Right-click the task or subtask.
2. On the shortcut menu, click **Delete task**.

*Tip:* You can also use **Ctrl+Del** as a [shortcut](#) or the button in the toolbar.

*Tip:* If you want to revert the deletion you made, use the undo command. To undo, select menu **Edit > Undo** or press **CTRL+Z**.

#### See also

[Actions on Tasks](#)

[Outliner](#)

### 5.1.4 Rearranging the Tasks and Subtasks

You can change the hierarchy and position of any task or subtask displayed in a hierarchical view.

#### To move a task or subtask into another task:

1. In any hierarchical view left-click a task you want to move.
2. Drag the selected task onto the task you want to move it under.  
The task you have moved will be displayed as a subtask under the corresponding outline item.

*Note:* if the task you moved to is collapsed, drag & drop puts the subtask as the last subtask in the list; otherwise, if the task is expanded, drag & drop puts it as the first subtask in the list.

#### To convert a subtask into a task:

1. In any hierarchical view left-click a subtask.
2. Drag the selected subtask into the left side of the task list, and then release the mouse button.

**Tip:** You can also use [shortcuts](#) to rearrange the tasks (see *Rearrange tasks in the outline*).

**Tip:** If you want to cancel the rearrangement you made, use the undo command as many times as necessary. To use undo select menu *Edit > Undo* or press **CTRL+Z**.

**Tip:** Drag & Drop tasks to a group in the task list to assign corresponding properties for the task.

See also

[Outliner](#)

### 5.1.5 Performing Actions on Tasks

You can perform different actions on the task items. All available actions are listed in the Task menu or local menu. To open the **local menu**, right-click a task in the list.

**Tip:** There are [Keyboard Shortcuts](#) assigned for many task actions.

**Note:** After most actions, you can use the **Undo** operation: *Edit > Undo*.

Action name in the local menu	Action description
New task	<a href="#">Create a new task</a>
New subtask	<a href="#">Create a new subtask</a>
New folder	Create a new folder
New project	Create a new project
New from template...	Create a new task branch using one of the existing tasks as a template
Zoom In	Perform <b>Zoom In</b> action. See <a href="#">Zoom in and Zoom out</a> for details.
Zoom out	Perform <b>Zoom Out</b> action. See <a href="#">Zoom in and Zoom out</a> for details.
Refresh	Update the display with all recent changes in the Outline
Set due date...	Activate the <b>Timing &amp; Reminder</b> property section and focus on the Due Date control to select new <a href="#">due date</a> for the task.
Skip occurrence...	Skip occurrence of a recurring task.
Cut task	Cut the selected task to the clipboard. When you paste the task to another location or another MLO window this task will be removed.
Copy task	Copy the selected task to the clipboard. Tasks copied to the clipboard can be pasted to other MLO instances or to other applications as outlined text.
Copy as	

Copy as local link	Copy as a <a href="#">link</a> to the selected task to the clipboard
Copy as URL	Copy as a URL to the selected tasks using mlo: protocol. You can paste this link into the Explorer address bar to navigate to this task. You can also use it to create <a href="#">links</a> between MLO tasks located in different data files.
Paste task as	Paste the previously copied task as Child or Sibling of the selected task.
Child	
Sibling	
Duplicate task	Create a copy of the selected task
Move to...	Opens a dialog to move the selected task to another task
Set bookmarks	Set a quick bookmark to a task
Goto bookmarks	Jump to a task using a bookmark
Import...	<a href="#">Import</a> the task outline from an external file in one of the supported formats.
Export...	<a href="#">Export</a> the selected branch or the entire outline to an external exchange file in one of the supported formats.
Archive...	Run <a href="#">manual archiving</a> .
<b>Advanced</b>	Advanced outline commands
Complete task and all subtasks...	Mark the task and all subtasks as completed
Uncomplete task and all subtasks...	Mark the task and all subtasks as uncompleted
Sort subtasks...	Sort subtasks of the selected task according to the entered sorting parameters.
Copy tasks as text...	Copy the outline to the clipboard as text. A number of options can be set for this operation (i.e. copy only expanded, mark completed etc)
Paste text as subtasks...	Paste text from the clipboard as subtasks of the selected task. Each text line from the clipboard will create a new task. The text in the clipboard is parsed to preserve the indentation.
Add Contexts to all subtasks...	Add the Contexts of the selected tasks to all its subtasks.
Replaces Contexts in all subtasks...	Replace the Contexts in all subtasks of the selected task with the Contexts of the selected task.
Clear Contexts for task and subtasks...	Clear the Contexts property of the selected task and all subtasks.
Properties...	<a href="#">Advanced Task Properties</a> .
Delete task	<a href="#">Delete</a> the selected task branch.

See also

[Outliner](#)

### 5.1.6 Zoom In and Zoom Out

If you have a complex tree of tasks with many branches and want to concentrate on one project and temporally hide all the others, you can use the **Zoom in** command.

**To Zoom in:**

1. Select a task in the Outline
2. Right-click the task
3. Click **Zoom-in...** .

*Tip: you can also use shortcut Ctrl+R or toolbar button to Zoom in*

The task you selected will be the new Root for your task tree. Its name will be shown on the top of the outline.

*Tip: You can use this command as many times as you want to move deeper and deeper into the task tree.*

*Note: The Zoom in command in the first Workspace (tab) will also affect the other Workspaces if these Workspaces configured with option "Sync zoom with first tab". If this option is not set then the Zoom in command does not affect this Workspace.*

**To return to the normal view**

1. Click the Zoom information bar on the top of the outline.

**See also**

[Views](#)

[Workspace tabs](#)

### 5.1.7 Outline Navigation

While you are browsing through the outline of your tasks, you can use various navigation buttons to move back, forward or to other level. You can also use: [Workspace tabs](#), [Task Links](#), [Bookmarks](#) and [Keyboard Shortcuts](#) to speed up your outline navigation.

Note that a full path to the task you selected is always displayed in the path control on top of the application window. It can be used to jump quickly to other level of the outline.



**See also**[Workspace tabs](#)[Links to Tasks](#)[Bookmarks](#)[Keyboard Shortcuts](#)**5.1.7.1 Creating Links Between Tasks**

You may need to associate a task to related tasks or files. You can do this by inserting links into the task notes. When you click a task link, the linked task is selected in the Outline. When you click a file link, the linked file opens in its associated program or viewer.

You can insert the following types of links:

- A link to a task in the same MLO file.
- A link to a task in another MLO data file.
- A link to a file or hyperlink.

You can also link to MLO tasks from other applications using the registered protocol [mlo://](#).

**To insert a task link by using the Task Notes command:**

1. Click the **Task Notes** tab of the task in which you want to create a link.
2. Right-click in the **Task Notes** tab.
3. On the menu, select **Insert link to a task**.
4. In the "Select Task" dialog box, select the task you want to link to and click **OK**.
5. Repeat steps 2–4 to insert additional links.

**To paste a task link into the task notes:**

1. In the Outline select the task that you want to link to.
2. Right-click this task.
3. On the menu, select **Copy as > Copy as link**. A link to this task is placed into the clipboard.
4. Right-click in the **Task Notes** tab of the task in which you want to create a link.
5. On the menu, select **Paste**.
6. Repeat steps 1–5 to insert additional links.

**Note:** An example of a link to a task in the same MLO file:

[\\mlo:{9FBDC6E4-3D95-4F02-8EF0-3AB5D4CE6507}](#)

**To insert a link to a task in another MLO data file:**

1. Open the MLO data file containing the task that you want to link to.
2. Right-click this task in the Outline.
3. On the menu, select **Copy as > Copy as URL**. The URL of this task is placed into the clipboard.
4. Open the MLO data file containing the task in which you want to create a link.
5. Right-click in the **Task Notes** tab of this task.
6. On the menu, select **Paste**.
7. Repeat steps 1–6 to insert additional links.

**Note:**

To convert the pasted URL to a link (so that it is underlined in the notes), type two backslashes (\\) at the beginning of the URL. An example of a link to a task in another MLO data file:

[\\mlo://c:\MyMLOFiles\Sample%20MLO%20file.ml?{F9BA410A-AB32-41BB-AE04-](#)

[869F0F490981}](#)

**Tip:**

You can use this command to link to a MLO task from other application using the [mlo://](#) registered protocol. For example you can enter this URL in the explorer address bar and press Enter. MLO will open the task specified by [Task GUID](#):  
[mlo://c:\MyMLOFiles\Sample%20MLO%20file.ml?{F9BA410A-AB32-41BB-AE04-869F0F490981}](#)

**To insert a link to a file:**

1. Select a task from in want to create a link.
2. Right-click in the **Task Notes** tab of this task.
3. On the menu, select **Insert link to a file**.
4. Browse to the file you want to link to.
5. Select the file and click **Open**.

**Notes:**

- If you create a link to a task from the [zoomed-in view](#) using the **Copy as link** or **Copy as URL** command, the task link will include the zoom-in command. So when you click the task link, the caption of the destination task will be highlighted in the zoomed-in view.
- You can specify both absolute and relative (in relation to the folder containing the current MLO data file) paths in file links.

**See also:**

[Outline Navigation](#)

[Outliner](#)

### 5.1.7.2 Bookmarks

To speed up the navigation in the outline, you can set a bookmark to a task and then jump back to it anytime with a single key stroke. There are 10 slots available for quick bookmarks: keys 0 through 9.

**To set a bookmark to a task**

1. Select a task in the outline you would like to set a bookmark to.
2. Select menu **View > Set bookmarks > Bookmark <N>**, or press Ctrl + Shift + <N>, where <N> is any key from 0 through 9.

**To jump to a task using bookmark**

1. Select menu **View > Go to bookmarks > Bookmark <N>** or press Ctrl + <N>, where <N> is any key from 0 through 9.

*Tip:* You can use shortcuts "Ctrl + >" and "Ctrl + <" to navigate to the next and previous bookmarks.

To review the list of all bookmarks available, select menu **View > Go to bookmarks > Bookmarks...** or press Ctrl + Alt + > .

**See also**

[Outline Navigation](#)

[Links to Tasks](#)

[Outliner](#)

[Keyboard Shortcuts](#)

## 5.2 The To-Do List

After you have added all your goals, projects, tasks and subtasks to the [Outline](#), MLO can display only those tasks which require immediate attention and place them in the To-Do List. This is a simple non-hierarchical list of actions selected from the entire Outline. This list can be sorted and grouped using different parameters. You can view your To-Do list using different views.

The To-Do list is updated automatically once you complete a task, change context or if [it is time to update the To-Do list](#).

To understand how MLO selecting tasks for the To-Do list basing on your Outline and task parameters, [learn how default To-Do views are working](#).

***Note:** The To-Do list is just a definition of filtered tasks (views) presented in a plain (non-hierarchical) list. You can create your own To-Do lists by [creating](#) non-hierarchical views.*

**See also**

[Default To-Do List Views](#)

[Manage Views](#)

[To-Do List Format](#)

### 5.2.1 Default To-Do List Views

When you create a new MLO data file, the standard To-Do List Views are created. You can also [create](#) any custom To-Do List Views.

Below is a description of the standard To-Do Views.

#### **Active Actions**

This is the basic view for generating To-Do lists in MLO. It is important to understand how it works since many views are based on it. The following tasks appear on the To-Do list in *Active Actions* view:

- 1) Tasks without open subtasks (whose subtasks have all been completed)
- 2) Tasks that do not have completed parent tasks
- 3) Tasks without a [Start Date](#), or whose Start Date is today or in the past
- 4) Tasks that do not have the option [Folder](#) checked
- 5) Tasks that do not have the option [Hide branch in To-Do List](#) checked for this task as well as for any of its parents
- 6) If one of the task's parents has the option [Complete subtasks in order](#) checked, this task must have

all above siblings completed - or these siblings must have their *Hide in To-Do* or *Folder* option set.  
7) Tasks that do not have [dependency](#) or these dependencies are completed

### Active Actions by Context

This view contains all the tasks described in the "Active Actions" view, but grouped by Contexts assigned to the tasks.

### Active Actions by Flag

This view contains all the tasks described in the "Active Actions" view, but grouped by Flag assigned to the tasks.

### Next Actions by Project

This view is based on the "Active Actions" view. The difference is that only **one** task for each project (the first one) is placed on the To-Do list in this view. This list is grouped by project of the tasks.

**Note:** *If there are Active Tasks without a parent project, then only the first task for each root task is selected for this view and these tasks placed under the (none) project group on the To-Do List.*

**Note:** *If a project does not have open tasks, then this project itself is also placed on the To-Do list as Next Action.*

### Active Starred

This view is based on the "Active Actions" view, but only starred tasks are added to this view. Also the Active Starred view is [manually](#) sorted. The Active Starred view has predefined settings which cannot be changed because it is synced to MLO running on mobile devices.

### Active Goals

This view is based on the "Active Actions" view, but only tasks with the goal property are added to this view.

### Start next 7 days / Start next 30 days

This view is based on the "Active Actions" view. The difference is that only active actions with Start date are displayed in this view including future tasks if their Start date within next 7 or 30 days accordingly.

### Due next 7 days / Due next 30 days

This view is based on the "Active Actions" view. The difference is that only active actions with Due date are displayed in this view including future tasks if their Due date within next 7 or 30 days accordingly.

**Note:** *The "Starred" view is different from "Active Starred". The Starred view contains **all** starred tasks (active and non-active). You can star any task by clicking on the Starred column. The Starred view is also [manually](#) sorted. The Starred view has predefined settings which cannot be changed because it is synced to MLO running on mobile devices.*

**Note:** *if you create a new data file from a template, there might be other standard views added to your data file by default.*

**Tip:** *Additional information such as project name or path can be displayed in the task title on the To-Do list. See [To-Do List Format](#) for more details.*

See also

[Manage Views](#)  
[To-Do List Format](#)

## 5.3 Views

View is a particular way of displaying the filtered, sorted and grouped tasks. When you create new data file, MyLifeOrganized creates default views for you. All available views are displayed in the left panel called Views pane. You can create your own views using built-in MLO features for filtering, sorting and grouping of your tasks.

The views can be hierarchical and in this case we call them [Outline views](#). The views can be non-hierarchical and in this case we call them [To-Do views](#).

Views can be organized into the groups. When you click a group in the Views pane the last used View from this group is selected. The view groups are highlighted with blue line and the View inside this group is selected with red line and red font. Expand the View group to see what is the actual view was selected when you selected this group. By default the following groups of views are created in MLO: *Outline, To-Do, Completed, More Views*.

To save the space on the screen you can hide task views pane by selecting menu: View->Task views pane. (Alt-F1). In this case you can open the view list by clicking the header of the task list.

You can open any view in new window so that you can drag&drop tasks from one list of tasks to another one.

See the topics below for more information about Views:

[Default Outline Views](#)  
[Default To-Do List Views](#)  
[Task Filtering](#)  
[Task Grouping and Sorting](#)  
[Manage Views \(create, rename, delete, rearrange, etc\)](#)  
[To-Do List Format](#)

### 5.3.1 Manage Views

The Views pane is used to create new views, rename view names, reorder views in the list, delete views, assigning icons to views. You can also assign hotkeys for the selected views. Use these hotkeys to activate selected views with a single click.

You can use export/import to move your views to other MyLifeOrganized data file.

Right click on a view in Views pane to access all available commands.

#### **To create a new custom view**

1. Open Views pane if it is closed (Alt+F1)
2. Right click to open local menu
3. Select **New view...** The new view will be created under selected view.
4. Enter the view name

#### **To change the settings of the created view**

1. Select this view from in the Views pane
2. Click Filter button to open Filter settings for this view.
3. Change its settings (see [filtering](#), [grouping and sorting](#) for more details)
4. Click "Save view..." in the bottom of the Filter pane
5. Change name if needed and click OK in the View Name dialog

***Tip:** You can also create a new view based on your current view. Just select a view and click "Save view..." on Filter pane. Enter new name for the view. A duplicate of the current view with new name will be created.*

#### **To rename a view**

1. Select view in the Views pane
2. Right click to open local menu
3. Click **Rename view...**
4. Enter the new name
5. Click OK

#### **To reorder the views list**

1. Drag the view in the Views pane to the desired position.

#### **To assign a hotkey to a view**

1. Select view in the Views pane
2. Right click to open local menu
3. Click **Assign hotkey...**
4. Press the new hotkey in the edit box.
5. Click **Assign hotkey** button

Views can be organized into the groups. When you click a group in the Views pane the last used View from this group is selected.

#### **To convert a view into view group**

1. Select view in the Views pane
2. Right click to open local menu
3. Click **This is a view group...**

#### **To delete a view**

1. Select a view (or several views ) in the Views pane
2. Right click to open local menu
3. Click **Delete...** and confirm deletion of the selected view(s)

If you have changed or deleted standard views, you can always recreate them or restore their default settings.

#### **To reset standard views**

1. Right click Views pane to open local menu
2. Click **Restore default views...** and confirm this action

#### **To export views**

1. Select views in the Views pane
2. Right click to open local menu
3. Click **Export view(s)...**
4. Enter a file name.

***Note:** The views you created in one data file are not synced to other data files. You can export your views from one data file and import them into another data file.*

You can open any view in new window so that you can drag&drop tasks from one list of tasks to another.

#### **To open view in new window**

1. Right click Views pane to open local menu
2. Click **Open in new window...**

#### **See also**

[To-Do List](#)

[Task Filtering](#)

[Task Grouping and Sorting](#)

## **5.3.2 Task Filtering**

Use filtering to select the tasks from the entire outline which should be placed on the current view.

The filter parameters are set on the Filter Pane. To open the Filter Pane click Filter button on Views pane or press Alt+F. The tasks are selected using a conjunction of Action Filter, Hierarchy Filter, Completion Filter, other Filter Controls and Advanced Filter.

#### **Action Filter**

With the Action Filter you should select what types of the tasks are placed to the filtered list. There are five options for this filter:

##### **1. Active**

If *Active* is selected as the Action Filter then only Active tasks are placed in the list first and then other filters can be used to select tasks from this list. To be placed on the list of Active actions, a task must meet all criteria listed below:

- 1) the task must not have subtasks or these subtasks should be completed
- 2) the task must not have completed parent tasks
- 3) the [Start Date](#) for the task is not set or Start Date is now or in the past
- 4) the task must not have the option [Folder](#) checked
- 5) the task must not have the option [Hide branch in To-Do List](#) checked for this task as well as for any of its parents
- 6) If one of the task's parents has the option [Complete subtasks in order](#) checked, this task must have all above siblings completed to be placed in the list. Or these siblings can have *Hide in To-Do* option set.
- 7) If the task has [dependency tasks](#) these dependency tasks must have been completed.

##### **2. Available**

If *Available* is selected as the Action Filter, then only Available tasks are placed in the list first and then other filters can be used to select tasks from this list. To be placed on the list of Available tasks a task should meet all the criteria listed for *Active Actions* except #6 and #7. This means that the option "Complete subtasks in order" and "Dependency" are not considered when retrieving the tasks for this list. The subtasks will appear on the list normally even if the parent task has "Complete subtasks in order" option set and even if dependency is set.

### 3. Next Actions

If *Next Actions* is selected as the Action Filter then only Next Actions are placed in the list first and then other filters can be used to select tasks from this list. To be placed on the list of Next Actions a task should meet all the criteria listed for Active Actions. However only one (first) active task for each project is placed in the list.

*Note: If there are Active Tasks without parent project then only first task for each root task is selected.*

*Note: If a project does not have open tasks then this project itself is also placed on the list as Next Action.*

### 4. Completed

If *Completed* is selected as the Action Filter then only Completed tasks from all levels of the outline are placed in the list first and then other filters can be used to select tasks from this list.

### 5. All

If *All* is selected as the Action Filter then all tasks from all levels of the outline are placed in the list first and then other filters can be used to select tasks from this list.

### Hierarchy Filter

With Hierarchy Filter you should select if parent tasks and/or subtasks should be also placed to the filtered list together with the tasks matched the filter. There are two options:

- 1) **Show Hierarchy: No** - the parent and children tasks will be not placed to the filtered list. The result of the filter will be the plain non-hierarchical list of tasks (To-Do List)
- 2) **Show Hierarchy: Yes** - the parent and/or child tasks of the filtered items will be also placed to the resulted list. The result of the filter will be a hierarchy (Outline).

When you choose to show the hierarchy you can continue to set the parameters for this view. Click **Config** button to see more options:

- **Include parent items** - include parent tasks for the tasks filtered with the main filter. You can also set additional filter for these parent tasks by clicking the link **Set parent filter**.
- **Include child items** - include child tasks to the tasks filtered with the main filter. You can also set additional filter for these child tasks by clicking the link **Set children filter**
- **Continue searching in branch after main filter match** - set this option to extract tasks matched to the main filter from the children branch to the root of the hierarchy.
- **Highlight matched to the main filter** - highlight the tasks in the list which match the main filter.

### Completion Filter

With Completion Filter you should select if completed tasks must be added to the filtered list. There are three options:

- 1) **Show Completed: Yes** - include completed tasks to the filtered list
- 2) **Show Completed: No** - exclude completed tasks from the filtered list
- 3) **Show Completed: Recent** - include only recently completed tasks to the filtered list. You can configure the date of the completion to include the task in additional settings for this option.



### Filter Controls

After selecting the Action Filter, Hierarchy Filter and Completion Filter (placed in General section of the filter pane) additional filters can be applied to the filtered list. For example you might want to select only Active tasks with specified Contexts and Effort parameters.

The special controls are used to apply additional filtering to the list. These controls are placed in the sections which could be expanded and collapsed. To be placed on the filtered list a task should meet all criteria specified in the filter sections. See [Filter Controls](#) for more details.

**Note:** if filter settings are changed for controls in a section, the caption of this section changes to bold.

**Tip:** You can reorder or hide filter sections that are not used. To reorder just drag a section using its caption. To hide unused sections, right click the sections and select items in Sections submenu.

### Advanced Filter

Advanced filter is used to add additional power to the filtered list. Using advanced filter, more complex queries can be added to the filter. To use Advanced filter, open Advanced section, check "Add advanced" checkbox and click "Setup..." button. In the "Setup Advanced Filtering" dialog setup the rules and click OK.

Please note that Advanced Filter is used in conjunction with parameters set in Action Filter, Hierarchy Filter, Completion Filter and Filter Controls.

The selected list of tasks can also be [grouped and sorted](#). You can also save the current list's settings as View. Just click "Save View..." link in the bottom of the Filter Pane. See [Manage Views](#) for more details.

**Tip:** The asterisk ( \* ) next to the view name indicates the filter criteria of the view have been edited and require saving. If you wish to retain the change click "Save View..." link at the bottom of the "Filter" panel and the ' \* ' will disappear. You can also roll-back to the View as last saved, by clicking on "Reset Settings" button.

### See also

[Filter Controls](#)

[Grouping and Sorting on the To-Do list](#)

[Manage Views](#)

#### 5.3.2.1 Filter Controls

The filter settings of the selected [View](#) can be changed "on the fly" using Filter Controls. The filter controls are placed to the sections which are described below.

***Tip:** if you do not see the filter pane click **Filter** in the bottom of the views list (#9 in the [Main Window overview](#)). Some of the sections in the filter pane maybe hidden. To unhide them, right click any section and check the hidden sections in the menu.*

### General

This section contains the following filters: Action Filter, Hierarchy Filter and Completion Filter. These filters are described in [Task Filtering](#) section.

### Text

You can filter the task list by any text contained in the task title, task notes or context assigned to a task. Click the configuration button in this section to select where to find the text.

### Contexts

You can filter the task list by [Context](#). In this case, only tasks assigned to this Context (or any of its [included Contexts](#)) will be listed in list.

If a Context you have selected is [closed](#) at the moment, the tasks associated with this Context will NOT be shown in the list unless you check the **Include closed** check box.

Several contexts can be selected if Ctrl+Click is used. Change "operation" to **AND** to see the tasks that contain all selected contexts. Change operation to **OR** if you want to see tasks that contain at least one of the selected contexts.

### Flags

You can filter the task list by [Flag](#). In this case, only tasks assigned to the selected flags will be listed in list.

### Time

You can filter the list by the time you have available now. MLO will list all tasks that fit into the time using current sorting order for you to choose the best fit. So for a task to be listed in the list with the **Time** filter set, its **Time required for the task Min** and **Max** values must be inside the range selected in **Time** filter.

***Tip:** click to "Look up in Outlook" link to calculate the time you have before next appointment in your Outlook calendar.*

### Effort

You can filter the list by the Effort required for the task. When the **Effort** filter is set, for a task to be listed in the list, its **Effort** parameter value must be between the selected range in the **Effort** filter

### References

You can filter the list to show all tasks that depend on the selected task(s) or link to the selected task(s). Right click on a task in the main list and select one of the commands: "Tasks that depend on this task..." or "Tasks that link to this task...". The selected tasks will be added to the References filter and you will get the filtered task list. Click the configuration button in this section to select filter type or clear this filter.

### Start Date

You can filter tasks by Start Date. When the **Start Date** filter is set, for a task to be listed in the list, its **Start Date** parameter must be between the selected range in the Start Date filter.

**See also**[Task Filtering](#)[To-Do List](#)[Contexts](#)[Assigning Contexts to a Task](#)

### 5.3.3 Task Grouping and Sorting

The [filtered](#) list of tasks in a [view](#) can also be grouped and sorted.

**To group and sort the tasks in the View**

1. On Views pane click Filter button (or Alt+F)
2. Open the Group&Sort section
3. Click "Group by..." button to group the list or "Sort..." to sort the list

You can also save the current list as a view. Just click "Save view..." button in the bottom of the Filter Pane. See [Manage To-Do List Views](#) for more details.

See more [about automatic and manual sorting](#).

**See also**[Task Filtering](#)[Manage Views](#)[Manual sorting](#)

#### 5.3.3.1 Understanding Task List Ordering

Tasks on the list can be sorted either automatically or manually.

**Automatic sorting**

You can select different options to automatically sort the task list. Automatic sorting of the task list depends on the [parameters you set](#) for the tasks.

One of the automatic sorting mode is [Computed-Score Priority](#). You will get excellent results if you take the time to configure the tasks more or less correctly. You will find that MyLifeOrganized will do an excellent job in presenting to-do lists that are sensibly prioritized according to the importance, urgency and date.

**Manual sorting**

You can switch from automatic sorting to manual sorting for any View. When a View is in manual sorting mode you can manually reorder the tasks in the list by dragging them to the desired positions. To switch to and from manual sorting mode click **Sort...** button in Filtering Pane and select **Manual sorting** option.

**See also**[Computed-Score Priority](#)[To-Do List Ordering Options](#)

## [To-Do List](#)

### 5.3.3.1.1 Computed-Score Priority

Computed-Score Priority mode uses the details you supply about each task to compute an individual score for each task in your outline. These scores are then used to provide a priority-ordered task list. The factors that contribute to each task's score are its [Importance](#), its [Urgency](#) and [Time](#).

1) **Importance**: Set the importance of each task only with regards to its parent item. Items with higher importance will be near the top of the task list. If a parent task has a lower importance; that will lower the importance of its child tasks (Importance inherits down the).

2) **Urgency**: Set the urgency of each task only with regards to its parent item. Items that have a higher urgency will be near the top of the task list. If a parent task has a higher urgency; that will raise the urgency of its child tasks (Urgency inherits down the outline).

3) **Time**: If you set a due date or a due date + start date; then the urgency of the task will be boosted as those dates get closer and are passed. Urgency will continue to climb even if the task is severely overdue.

How much effect the start and due date will have on the overall urgency of the task can be configured in the [MLO preferences](#). The preferences allow you to set the start and due date weighting factors individually. The higher you set the weights, the more influence the dates will have on the list ordering.

MLO allows you to [configure](#) it to order tasks by just importance, just urgency or a combination of both.

## [More details on Computed Score Priority](#)

### 5.3.3.1.1.1 More Details on Computed-Score Priority

Computed-Score Priority mode uses the details you supply about each task to compute an individual score for each task in your outline. These scores are then used to provide a priority-ordered To-Do List. The factors that contribute to each task's score are its Importance and its Urgency. The To-Do List will include tasks that have no uncompleted children tasks, ordered by their Computed-Score Priorities.

The To-Do list can be configured to order tasks by just Importance, just Urgency, or a combination of both.

## **Importance Slider**

The absolute importance of each task is a computed value and is not directly set by the user. Instead, for each task you set the importance of that task with regards to its immediate parent. Once you have done that, the program will compute the task's actual importance. A task's importance to its parent is controlled by a slider. The slider ranges along an inverted natural logarithm curve. This actual curve is documented below. The slider values range from 0.9964 to 1.0036, with a midpoint value of 1.0000. Because of the logarithm curve applied any position on the slider to the left of the midpoint has an exact opposite to the right of the midpoint. This allows a lower importance to be nullified by an equal but opposite higher importance.

Suppose that you have two projects in the root of the outline (Prj1 and Prj2), and that each of them has one subtask (p1 and p2, respectively). The importance of each task will be calculated as follows:

[Computed actual importance of p1](#) = (Prj1 Importance to outline) \* (p1 Importance to Prj1)

Computed actual importance of p2 =(Prj2 Importance to outline) \* (p2 Importance to Prj2)

For example, if the importance values are set as follows:

$$\text{Prj1} = 0.9972, \text{Prj2} = 0.9964, \text{ps1} = 1.0036, \text{ps2} = 1.0036$$

then these tasks' computed importance scores will be as follows:

$$\begin{aligned} \text{Prj1} &= 0.9972 \\ \text{Prj2} &= \mathbf{0.9964} \\ p1 &= 0.9972 * 1.0036 = 1.0001 \\ p2 &= 0.9964 * 1.0036 = 1.0000 \end{aligned}$$

If you are ordering your To-Do List solely by importance, the To-Do List will order the tasks as follows:

p1  
p2

If p2 is completed first, the To-Do List will now display:

p1  
Prj2

However, if p1 is completed first, the To-Do list will display:

p2  
Prj1

**Note:** if you use a task just to group together other like tasks, you should set this "container" task to midpoint importance relatively to its parent, to avoid artificially lowering the importance of the tasks it contains.

### Urgency Slider

The absolute urgency of each task is a computed value and is not directly set by the user. Instead, for each task, you set its urgency with regards to its immediate parent. Once you have done that, the program will compute the task's actual urgency. A task's urgency with respect to its parent is controlled by a slider. The slider ranges along an inverted natural logarithm curve. This actual curve is documented below. The slider values range from 0.9964 to 1.0036, with a midpoint value of 1.0000. Because of the logarithm curve applied any position on the slider to the left of the midpoint has an exact opposite to the right of the midpoint. This allows a lower urgency can be nullified by an equal but opposite higher urgency...

Repeating our example from the importance overview, you have two projects in the root of the MLO outline (Prj1 and Prj2), and each project has one subtask (p1 and p2, respectively). The urgency of each task is computed as follows:

$$\begin{aligned} \text{Computed actual urgency of p1} &= (\text{Prj1 urgency to outline}) * (\text{p1 urgency to Prj1}) \\ \text{Computed actual urgency of p2} &= (\text{Prj2 urgency to outline}) * (\text{p2 urgency to Prj2}) \end{aligned}$$

For example, if the importance values are as follows:

$$\text{Prj1} = 0.9979, \text{Prj2} = 0.9960, \text{ps1} = 1.0030, \text{ps2} = 1.0030$$

and if the tasks have no due dates set (see a later section for the effect of due dates on urgency), the computed urgency scores will be as follows:

$$\begin{aligned} \text{Prj1} &= \mathbf{0.9979} \\ \text{Prj2} &= 0.9960 \\ p1 &= 1.0030 * 0.9979 = 1.0009 \\ p2 &= 0.9960 * 1.0030 = 0.9990 \end{aligned}$$

If you are ordering your To-Do List solely by Urgency, the To-Do List will be ordered as follows:

p1  
p2

If p1 is completed first, the To-Do List will now be ordered as follows:

p2  
Prj1

However, if p2 is completed first, the To-Do List will now be ordered like this:

p1  
Prj2

### Weekly Goal Weighting factors

If a task is marked as a weekly goal, then the urgency gets an extra boost. The weekly goal slider value ranges from 0.02 – 6.00. This boost re-computes the urgency as:

$$\text{Computed actual urgency of p1} = (\text{Prj1 urgency to outline}) * ((\text{p1 urgency to Prj1}) + (\text{WeeklyGoalSliderWeight}/150))$$

### Importance and Urgency Combined

If you set MLO to consider both Urgency and Importance in calculating task scores, the score for each task will be the product of its important and its urgency.

Revisiting the examples in the previous two sections, the assigned importance values were:

$$iPrj1 = 0.9972, iPrj2 = 0.9964, ips1 = 1.0036, ips2 = 1.0036$$

and the assigned urgency values were:

$$uPrj1 = 0.9979, uPrj2 = 0.9960, ups1 = 1.0030, ups2 = 1.0030$$

The combined importance and urgency scores will then be:

$$\begin{aligned} Prj1 &= 0.9972 * 0.9979 = 0.9951 \\ Prj2 &= 0.9964 * 0.9960 = 0.9924 \\ p1 &= 0.9972 * 1.0036 * 0.9979 * 1.0030 = 1.0017 \\ p2 &= 0.9964 * 1.0036 * 0.9960 * 1.0030 = \mathbf{0.9990} \end{aligned}$$

If you are ordering your To-Do List by both urgency and importance, then, the To-Do List will display the tasks ordered as follows:

p1  
p2

If p2 is completed first, the To-Do List will now be ordered as follows:

p1  
Prj2

However, if p1 is completed first, the To-Do List will now be ordered as follows:

p2  
Prj1

### Factoring Dates into the Urgency Calculation

If the preferences are set to order the To-do List by "Urgency" or by "Importance and Urgency" (that is, if Urgency is to be considered and not just Importance), then start and due dates are used to weight the score of each task based on the nearness to today's date of the dates in question.

How much effect the start and due date will have on the overall urgency of the task can be configured in the preferences. The preferences allow you to set the start and due date weighting factors individually. The higher you set the weights, the more influence the dates will have on the list ordering. Since the weights can be set independently, you can configure the to-do list the way you like, including giving higher priority to start dates than to due dates.

### Date dependant weights

In the preference you can set the start dates and due date weighting factors. These factors control the net effect of the following calculations on the final computed scores. The DateScoreContribution is computed based on which dates are set and whether or not the overdue boosting is turned on where the StarDateWeightFactor and DueDateWeightFactor range from 0 to 6

#### If No Start Date and No Due Date

DateScoreContribution=0

#### If Start Date and no Due Date

Elapsed = now - StartDate

StartDateScore = (StartDateWeightFactor \* Elapsed) / 500

DateScoreContribution = StartDateScore

#### If Due Date and no Start Date

Remaining = now - DueDate

If OverDueBoost Is turned on AND remaining < 0 then

    boost = remaining \* -0.25

Else

    boost = 1.0

End If

DueDateScore = (DueDateWeightFactor \* Remaining \* boost) / 500

DateScoreContribution = DueDateScore

#### If Due Date and Start Date both set

Compute DateDateScore and StartDateScore as above

DateScoreContribution = DueDateScore + \_StartDateScore

### Determining the final score

Once the start and due date score contributions are computed, they are simply added to the current priority score. If you are viewing the To-Do List by just urgency you then get:

Score = UrgencyScore + DateScoreContribution

If you are viewing the To-Do List by importance and urgency combined, you get:

$$\text{Score} = (\text{ImportanceScore} * \text{UrgencyScore}) + \text{DateScoreContribution}$$

Providing a meaningful example of these results in writing is beyond the scope of this documentation. You are encouraged to play with the program settings and observe the results. It will quickly become apparent that items increase in priority as their start and due dates approach. Just how much they increase depends on how the weighting preferences are set. The program defaults should provide a reasonable starting point for just about everyone.

### The Really Heavy Math

As mentioned above the importance and urgency sliders ranges along an inverted natural logarithm curve. That curve is calculated with the formula below. Why is this formula used? (1) The natural log curve is very predictable. (2) It can be reversed through simple multiplication. Items (1) and (2) allows a slider at a positive position of X to be reverse by a slider at position  $-X$ .

Through this approach inherited importance and urgency are calculated using a simple lightweight multiplication formula that is very fast. More importantly this formula allows for importance and urgency to have a Neutral Center position allowing each task to either raise OR lower it's importance and urgency values.

Minimum Slider Position Input Value = 1000

Maximum Slider Position Input Value = 1050

Default Slider Position Input Value = 1025

For the current importance slider the value = A

For the current urgency slider the value = B

You compute x=importance and u=urgency with this formula

```
If A <= 1025 then
    x = LogN(1025, A)
Else if A > 1025 then
    x = 1+(1-(LogN(1025, 1025-(A-1025))))
end if
```

```
If B <= 1025 then
    u = LogN(1025, B)
Else if B > 1025 then
    u = 1+(1-(LogN(1025, 1025-(B-1025))))
end if
```

Now computing these computing logs is not a very CPU friendly proposition especially on the ppc, to avoid this overhead MLO uses a lookup table. This introduces a very minor rounding error into the calculations; which is the trade off for much greater speed. This rounding error should not affect the results unless an outline is greater than 10 levels deep and even then it will be inconsequential.



### 5.3.4 Columns

You can select which columns to display in the current view.

#### To select columns:

1. Right-click on the task list header.
2. From the pop-up menu, select the columns you need.

***Tip:** Select Auto Resizing in the columns pop-up menu if you want task columns to resize together with the MLO window.*

***Note:** The column configuration is stored for the current view.*

#### See also

[Views](#)

## 5.4 Workspace tabs

There are tabs on the top of the MyLifeOrganized application we call Workspaces. The Workspaces are used to store and quick access the particular configuration for the selected [view](#), additional [filter controls](#), [zoom](#), selected tasks etc. The Workspaces can show different parts of the same data files in different views.

When you select a view inside Workspace or change the filter, you actually change the configuration of the current Workspace. When you click other Workspace you will see other configuration in it. When you return back to the first Workspace your changes for this Workspace will be still there. If you want to propagate the changes to filtering, sorting and grouping in one Workspace to other Workspaces, you must first save these changes into a [View](#). This way all the Workspaces which are using this View in unchanged state will receive the new settings.

#### To create a new Workspace

1. Click "+" button in the tabs line
2. Enter name for the new Workspace
3. If needed, set other parameters (see below)
4. Click any part of the main window to hide the popup window

#### To rename a Workspace

1. Right click on a Workspace tab
2. Select "Set up workspace..." from menu
3. Enter new name in the popup dialog
4. Click any part of the main window to hide the popup window

#### To delete a Workspace

1. Click sign "x" in the right part of the Workspace tab

***Note:** The last workspace cannot be deleted*

You can set default settings for a Workspace to restore them quickly at any time. You can set zoom, view and additional filters to store them as default for this Workspace.

**To set default for a Workspace**

1. Set necessary settings for a Workspace
2. Right click on this Workspace tab
2. Select "Set as default for this tab" from menu

Now if the settings of the Workspace are changed the tab will be marked with "\*" symbol. If you double click on the tab (or select command "Restore default for this tab") the default setting for the tab will be restored.

***Tip:** With the command "Lock default in this tab" you can also lock the default settings so that they are not changed for the tab. The new tab is created if you try to change the settings of the locked tab.*

You can pin Workspace tab so that it is placed in first position and protected from accidental deletion.

**To pin a Workspace**

1. Right click on a Workspace tab
2. Select "Pin this tab" from menu

When you set Workspace option "Sync selection with first tab" the task selection in this tab will be in sync with the selection in the first tab. It means that if you select a task in the first tab and then switch to other tab, with this option set, the selected task will be also selected in the new tab after switching (if it is found on this tab).

**To sync selection with the first tab**

1. Right click on a Workspace tab
2. Select "Set up workspace..." from menu
3. Check option: "Sync selection with first tab"

**To assign an icon for the tab**

1. Right click on a Workspace tab
2. From the menu select "Assign icon":

**Current view icon** - the tab icon will be always the same as the icon of the selected view

**Custom icon** - the selected custom icon will be always visible

**No icon** - there will be no icon for this tab

**To select a hotkey for the tab**

1. Right click on a Workspace tab
2. Select "Assign hotkey" from the menu
3. Press a hotkey for this tab and click "Assign hotkey"

When you set Workspace option "Sync zoom with first tab" the zoom you set in this tab will be also set in the first tab. It means that if you set zoom to a task in the first tab and then switch to other tab, with this option set, the same zoom will set in the new tab after switching.

**To sync zoom with the first tab**

1. Right click on a Workspace tab
2. Select "Set up workspace..." from menu
3. Check option: "Sync zoom with first tab"

You can open any Workspace in new window so that you can drag&drop tasks from one list of tasks to another one.

**To open Workspace in new window**

1. Right click on a Workspace tab
2. Select "Open in new window" from menu or F3

**See also**

[Basic concepts: Outline, To-Do, View, Workspace](#)

[Views](#)

[Zoom](#)



# Chapter

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VI

## 6 Task properties

You can set additional parameters on a task. These parameters are used in the task. For example, [Task Importance](#) or [Due Date](#) parameters are used in the to-do list ordering algorithm. All these parameters are placed in the **Properties Pane** and grouped into **Property Sections**. Click on a Property Section to open or close it. You can also use [Keyboard Shortcuts](#) for quick access to the Property Sections.

### To open a Property Section and enter task parameters:

1. Open the **Properties Pane** by selecting menu **View > Properties Pane**
2. Select the **Properties** tab and open the section you need
3. Enter parameters for the selected task

***Tip:** double-clicking on the splitter between the task list and Properties Pane will optimize the width of the Properties Pane.*

### See also

[Understanding of Main Window](#)

## 6.1 Assigning Contexts to a Task

Many tasks in your list can be completed only in certain Contexts or situations. You can assign specific Contexts for tasks so that you can filter these tasks later in the To Do list. You can also think of Contexts as categories for the tasks. Each Context can also include other Contexts in a hierarchy.

### To select Contexts for a task

1. Open the **Properties Pane** by selecting menu **View > Properties Pane**
2. Select the **Properties** tab and open the **General** section
3. Write the Context name in the **Contexts** edit box.

***Note:** If you enter a Context name which does not exist in the Contexts list, you will be prompted to create the new Context.*

***Tip:** You can [assign](#) hotkeys to particular Contexts to toggle these Contexts for a task with a single keystroke.*

***Tip:** You can use the **Alt+2** shortcut to perform actions 1 and 2 above.*

***Tip:** You can also use a hotkey (the default is **Alt+L**) to open Contexts dialog.*

***Note:** Multiple Contexts may be assigned to a task.*

**IMPORTANT:** The **Contexts** will NOT be displayed on the task properties page if the **Contexts** check box is NOT selected on the [Appearance](#) page of the Options dialog box.

### See also

[Contexts](#)  
[Filter Controls](#)  
[Options - Appearance](#)  
[Keyboard Shortcuts](#)

## 6.2 Importance for parent

For each task you can specify its **importance** in relation to accomplishing the project that contains this task in the outline.

This parameter is used in the to-do list ordering.

### To change importance of a task:

1. Open the **Properties Pane** by selecting menu **View > Properties Pane**
2. Select the **Properties** tab and open the **General** section
3. Drag the **Importance for parent** slider right to increase the importance of a task for the project.

***Tip:** You can use Alt+2 shortcut to perform actions 1 and 2 above.*

***Note:** When you set the priority of a task in most other To-Do programs you actually set the absolute priority, and must compare it to all other tasks in the list. In MLO, however, you only consider how important it is to complete the task with respect to the parent project.*

**IMPORTANT:** The **Importance for parent** will NOT be displayed on the task properties page if the **Importance/Urgency** check box is NOT selected on the [Appearance](#) page of the Options dialog box.

### See also

[Understanding of To-Do List Ordering](#)  
[Options - Appearance](#)

## 6.3 Urgency

For each task you can specify its **Urgency**. This parameter is used in to-do list ordering.

### To change urgency of a task:

1. Open the **Properties Pane** by selecting menu **View > Properties Pane**
2. Select the **Properties** tab and open the **General** section
3. Drag the **Urgency** slider right to increase the urgency of a task.

***Tip:** You can use Alt+2 shortcut to perform actions 1 and 2 above.*

**IMPORTANT:** The **Urgency** will NOT be displayed on the task properties page if the **Importance/Urgency** check box is NOT selected on the [Appearance](#) page of the Options dialog box.

**See also**[Computed Score Priority](#)[Understanding of To-Do List Ordering](#)[Options - Appearance](#)

## 6.4 Goal for week, month and year

MLO helps you organize your goals. You can indicate that a task is a **weekly goal**, **monthly goal** or **yearly goal**. The special [Goals](#) view is designed to easily review all your goals.

The weekly goal is what you should focus your activities on for the week. Monthly goals should be reviewed on a weekly basis to determine specific actions that can be done this week to achieve monthly goals. Yearly goals are usually reviewed on a monthly basis to determine if some of them can become goals for the current month.

**To indicate that the task is a goal**

1. Select a task you want to set as a goal
2. On the **General** section of the task **Properties Pane**, select **Week**, **Month** or **Year**

***Tip:** You can use a configurable hotkey to make a task a weekly goal (Alt+W by default).*

***Note:** The weekly goal parameter can be used in [to-do list ordering](#).*

***Note:** Weekly goal tasks are marked with "!" in the task list*

***Note:** Completed goals are marked with a Green Tick icon in the task list.*

**IMPORTANT:** The Goals will NOT be displayed on the task properties page if the Goals check box is NOT selected on the [Appearance](#) page of the Options dialog box.

**See also**[Outline Views](#)[Options - Appearance](#)[Understanding of To-Do List Ordering](#)[Projects Tracking](#)

## 6.5 Task To-Do List Visibility

Task To-Do List Visibility determines whether the task should be included in the To-Do list in [standard views](#).

**Folder**

This task is not shown in the To-Do list in standard views because it is just a container for other tasks. Folders contain tasks but, unlike regular tasks that have subtasks, folders do not appear in the To-Do list themselves after all their subtasks are completed.

**Hide the branch in To-Do List**

This task and all of its subtasks are excluded from standard views on the To-Do list. This option is usually needed if the entire branch is not actionable at the moment or if it contains only reference



information.

**Note:** Tasks which are set to be hidden in the To-Do list will appear dimmed in the **Outline**.

### Complete subtasks in order

You can instruct MLO to place the next subtask of a project in the To-Do list only after the previous subtask is completed. This way you can create projects where certain tasks are dependent on the completion of other tasks.

**Note:** This option can be suppressed and all subtasks shown in the To-Do list if **Available** is set in [Action Filter](#).

### To assign To-Do visibility parameter to a task:

1. Select task(s) in the outline.
2. Click the **Properties Pane** and open the **General** section.
3. Select an option in the Task To-Do Visibility group.

### See also

[To-Do List](#)

[Options - Appearance](#)

[Importance of the Task](#)

## 6.6 Timing & Reminder

The Timing & Reminder property section contains the following parameters for a task:

- [Start date, due date, lead time](#)
- [Task recurrence](#)
- [Reminder](#)

**IMPORTANT:** The **Timing & Reminder** property section will NOT be displayed on the task properties page if the **Timing & Reminder** check box is NOT selected on the [Appearance](#) page of the Options dialog box.

**Tip:** Date and time text input fields are very powerful: they are interpreted and converted to valid dates and times. For example you can type "in 30 min" or "tomorrow at 2pm". See [Input parsing](#) for more details.

### See also

[Options - Appearance](#)

[Input parsing](#)

### 6.6.1 Start, Due date and Lead time

You can specify when a task should appear in your to-do list and when a task is the due. The Start date parameter indicates when this task should appear in the to-do list. Due date shows when this task should be completed. Lead time is the time between Due date and Start date.

**To set start and due date for a task:**

1. Open the **Properties Pane** by selecting menu **View > Properties Pane**
2. Select the **Properties** tab and open the **Timing & Reminder** property section
3. Enter start date and due date in the appropriate controls.

**Note:** By default all subtasks inherit the dates of the parent task unless you set specific dates for the child task. If you want to revert the subtask dates to the inherited parent dates just check the "Inherit parent dates" checkbox.

**Tip:** In addition to the date, you can also enter start and due **time**. Just check **Use time** check box and enter time in appropriate controls.

**Tip:** Date and time text input fields are very powerful: they are interpreted and converted to valid dates and times. For example you can type "in 30 min" or "tomorrow at 2pm". See [Input parsing](#) for more details.

**Tip:** **Today**, **next day**, **next week** links will set the corresponding date in the active date control. For example **Next day** adds one day to the date currently set in the active control.

**Note:** The **Start date** field is disabled if you set recurrence for the task. Start date can be changed only in the [Recurrence dialog](#).

**See also**

[Task recurrence](#)

[To-Do List](#)

[Understanding To-Do List Ordering](#)

[Input parsing](#)

## 6.6.2 Recurrence

You can set a task to occur repeatedly. For example a task that occurs on a regular basis, such as a weekly status report or periodical car maintenance, can be set up as a recurring task.

**To make a task a recurring task:**

1. Open the **Properties Pane** by selecting the menu option **View > Properties Pane**
2. Select the **Properties** tab and locate the **Timing & Reminder** property section
3. Check the **Set due date** check box
4. Click the **Recurrence** button to open the **Task Recurrence** dialog
5. Click the frequency (Hourly, Daily, Weekly, Monthly, Yearly) at which you want the task to recur.
6. Select the desired options on the right side of the **Recurrence pattern** group box and click OK.

**Note:** Recurring tasks appear one at a time in the Outline. When you mark one occurrence of the task complete, the next occurrence appears in the list.

**Note:** After you set a task as recurring, the Start, Due, and Lead Time date controls in the **Timing & Reminder** property section will be disabled. To

*change the date/time parameters of a recurring task you should open the **Task Recurrence** dialog and change them there. This is because in the case of a complex pattern (for example: "first Monday of every other month") the date parameters should be controlled to fit this pattern.*

**Tip:** To repeat a task based on the date it is marked complete, in the **Task Recurrence** dialog click **Regenerate new task**, and then type a time interval in the box.

**Note:** The task's **Due date** is used for recurrence (not the Start Date). For example if you set a task to "reoccur every Sun" this means that the due date will be set to Sunday for each future occurrence.

### Recurring tasks: Advanced options

The following settings become available when you click on the Advanced options button of the Task Recurrence dialog.

#### [Automatic resetting of subtasks when this task recurs](#)

This option is used if you want all subtasks of the recurring task to be unchecked with a new occurrence.

#### [Automatic recurring behavior for this task](#)

This option is used if you want the recurring task to automatically recur when its subtask is completed.

**Automatically recur if any subtask is completed** - the task will recur if any subtask is completed (even without checking off the recurring task itself).

**Automatically recur if all subtasks are completed** - the task will recur if all subtasks are completed (even without checking off the recurring task itself).

**Disable automatic recurrence** - you would have to check off the task itself before it recurs.

#### [Do not create a completed copy of this task on recurring](#)

Set this option to not create a completed copy of the recurring task on each new occurrence.

**Note:** If subtasks of a recurring task have their own start and due dates, the shift between the recurring task's date and the dates of each its subtasks will be preserved on its next occurrence. To preserve this shift with the next occurrence, the option Automatic resetting of subtasks when this task recurs must be set.

#### **Example:**

Thanksgiving Dinner	(due 3rd Thursday every November)
Invite relatives I like	(due 20 days before event)
Clean house	(3 days before event)
Buy turkey	(due 1 week before event)
Thaw turkey	(2 days before event)
Cook dinner	(day of event)
Clean house	(1 day after event)

### [To stop a recurring task](#)

1. Select the recurring task you want to stop.
2. Locate the **Timing & Reminder** property section as indicated above.
3. Click the **Recurrence** button to open the **Task Recurrence** dialog.
4. Click **Remove Recurrence**.

#### To skip occurrences of a recurring task

1. Select the recurring task you want to skip.
2. Select **Task >Skip occurrence...** command
4. Choose if you want to skip only current occurrence or all occurrences of the task up to today.

### 6.6.3 Reminder

You can set a reminder for a task.

#### To set a reminder for a task

1. Open the **Properties Pane** by selecting the menu option **View > Properties Pane**
2. Select the **Properties** tab and locate the **Timing & Reminder** property section
3. Check the **Reminder** check box
4. Set date and time for the reminder

You can configure different Alert Actions for each reminder such as "play sound", "send e-mail" etc.

#### To set Alert Actions for a reminder

1. In the **Timing & Reminder** property section click the **Advanced...** button
2. In the dialog **Setup Reminder** check Alert Actions you want to be executed for this reminder
3. Click OK.

#### List of Alert Actions

Alert Action	Description
Activate in Reminders Window	Activate Reminders Window and place the task description in it. You can then dismiss or snooze the reminder in this window.
Show Desktop Alert	<p>A Desktop Alert is a notification that appears on your desktop and fades automatically. Set this option to show the task description in a Desktop Alert.</p> <p><b>Note:</b> If you want to keep a Desktop Alert visible so that you can take more time to read it, pause your cursor on the alert before it fades from view.</p>
Send e-mail	Sends an e-mail message with the task description to selected e-mail addresses. Separate e-mails with semicolons (;). Click <b>Setup</b> to configure SMTP options

Run application	You can run any application or reminder. Type the application command line in the text input.
Show modal dialog	Check this option to show a modal dialog with task description when the reminder is activated.
Play sound	Check this option and select a sound file to play it when the reminder is activated.

**Note:** You can set **Repeat Alert Actions** option to repeat alerts several times or until you dismiss the reminder.

See also

[Start, Due date and Lead time](#)

## 6.7 Effort

The Effort property section contains the following parameters of a task:

- [Effort](#)
- [Time Required for a Task](#)

**IMPORTANT:** The **Effort** property section will NOT be displayed on the task properties page if the **Effort** check box is NOT selected on the [Appearance](#) page of the Options dialog box.

### 6.7.1 Task Effort

You can select how much **Effort** it will take you to complete the task.

This value affects the dynamically calculated completion percentage for a [project](#). This percentage is based on how many subtasks of the project are completed and what their **Task Effort** properties are. If a task has higher value of **Task Effort** property it adds more value to the completion percentage for the entire project.

Task Effort is also used in [To-Do List filtering](#).

**Note:** This parameter is different from [Time required for a task](#) parameter. For example if you just read a book, it would require less effort than if you write MLO help documentation :-). It might take you the same amount of the time to accomplish these tasks but the Effort would be different.

See also

[Projects Tracking](#)

[Time required for a task](#)

### 6.7.2 Time Required for a Task

You can enter how much time is required to accomplish a task. The minimum and maximum values can be entered. This time will be used in the [Time](#) filter in the To-Do list.

### To enter the time required for a task

1. Open the **Properties Pane** by selecting menu **View > Properties Pane**
2. Select the **Properties** tab and open the **Effort** section
3. Enter the minimum and maximum time in the **Time required for the task** controls.

*Tip:* You can use the **Alt+3** shortcut to perform actions 1 and 2 above.

Time Required for a Task is also used in [To-Do List filtering](#).

### See also

[Filter Controls](#)

[Task Effort](#)

[Keyboard Shortcuts](#)

## 6.8 Dependencies

There can be tasks in the outline which cannot be started until some tasks from other branches are completed. To prevent a task from being shown in the To-Do list in Active Actions view until other tasks are completed, add these tasks to the Dependencies section for the task you want to block.

### To hide task A on the To-Do list in Active Actions view until tasks B, C and D are completed:

1. Select task **A** in the outline
2. On the **Dependencies** section of the task **Properties Pane**, click **Add...** link
3. Select tasks **B, C, D** (use Ctrl for multi select) and press **OK**

The task A will appear in Active Actions view only when all tasks (B, C, D) are completed.

*Tip:* If you want to unblock task A when only one of the tasks B, C, D are completed click on **ALL/ANY** link to set the appropriate option.

*Tip:* If the task has a dependency set, a corresponding icon is displayed in the **Icons** column.

*Note:* The dependency can be ignored if **Available** is set in [Action Filter](#).

*Note:* If a task in a dependency list cannot be completed a special indicator is added to it. Point your mouse at this indicator to see *why* the task cannot be completed.

A special Dependency Counter [column](#) shows how many tasks depend on the current task.

You can also set **Delayed Dependency** for tasks. If delay is set together with dependency then after the dependency tasks are completed, the task will continue to be inactive for the delay period you have specified. After the delay is over, the task will be shown in the To-Do list. For example, you can see the task "Hang wallpaper" activated in 1 day after you completed the dependency task "Paint the door".

### To set Delayed Dependency

1. Set dependency for a task as described above
2. In the field Delay set the time to delay the activation of the task after the dependency tasks are completed

***Note:** if all tasks need to be completed to open the dependency (option ALL set) then the delay will count from the time of the **last** task completed. If ANY option is set for the dependency then the delay will count from the time of the **first** task completed in the dependency list.*

See also

[Task To-Do Visibility](#)

## 6.9 Project

You can indicate that a certain task is a **Project**. All projects are included in a special [Projects](#) view. In this view, projects are grouped by statuses and are easy to review.

**To indicate that a task is a project:**

1. Select a task you want to indicate as a **Project**
2. On the **Project** section of the task **Properties Pane**, select **This is a project**

You can set a status for the project. The following statuses are possible: **Not Started**, **In Progress**, **Suspended**, **Completed**. Statuses are only used for grouping in the [Projects](#) view.

**To change the status of a project:**

1. Select a task
2. On the **Project** section of the task **Properties Pane**, select new status from the **Status** combo box.

***Note:** The status of a project is not automatically changed (to **In Progress** or **Completed**) when you complete the project subtasks. You must always change the status of a project manually.*

Each project has dynamically calculated **Completion Percentage**. This percentage is based on how many subtasks of the project are completed and what their [Task Effort](#) properties are. If a subtask has higher value of **Task Effort** property, it adds more value to the completion percentage for the entire project.

The **Time required for the entire project** read-only property of a project is the sum of the [Time required for the task](#) property of all subtasks of the project.

**IMPORTANT:** The **Project** property section will NOT be displayed on the task properties page if the **Project** check box is NOT selected on the [Appearance](#) page of the Options dialog box.

See also

[Task Effort](#)

[Outline Views](#)

[Options - Appearance](#)

[Review](#)

## 6.10 Review

You can indicate that a certain task should be periodically reviewed. For example you can review a project weekly to add new tasks to it or to change priorities of the subtasks. When it is time for the next

review this project is placed to the [Review](#) default view. You can open this view periodically to review the tasks. Once the task is reviewed mark it by command "Mark Reviewed" to move the review for this task on the next date.

Review is a good way to keep your task list in order and keep the most important project running.

#### To configure current task for periodical review

1. Open the **Properties Pane** by selecting menu **View > Properties Pane** (if it is closed)
2. Open the **Review** section
3. Check **Next Review** option and select a date for the next review.
4. In the filed **Review Every** set the period for the review.

#### To perform periodical review

1. When you have free time just open the view **Outline->Review**
2. All the tasks ready for the review will be placed to the list together with their subtasks
3. Perform actions needed for the project in review (add new tasks, change properties of other tasks, etc.)
4. Once the project is reviewed mark it by command "Mark Reviewed" in the list or in task properties

#### See also

[Projects](#)

## 6.11 Task Format

You can assign custom formatting to tasks. Parameters such as font color or bold can be set.

#### To assign custom format to task:

1. Select the task(s) you want to format
2. On the **Format** section of the task **Properties Pane**, select the task format needed.

***Note:** if you change task formatting with controls on the **Format** section, the flag "Use custom formatting" will be set automatically.*

***Note:** if you select option "Subtasks inherit custom formatting" then all subtasks of the selected task will have the formatting you set for the parent unless child tasks have their own formatting.*

#### To remove custom formatting from task(s):

1. Select the task(s) you want to revert to the default formatting
2. On the **Format** section of the task **Properties Pane**, uncheck **Use custom formatting** checkbox.

#### See also

[Task Properties](#)



## 6.12 Task Statistics

You can review task statistics. The following properties are available: **Created**, **Modified**, **Completed**. Each is indicated with date and time.

### To review task statistics:

1. Open the properties pane by selecting menu **View > Properties Pane**
2. Select **Properties** tab and open **Task Statistics** section

***Tip:** You can also open the Task Statistics section with the Alt+5 shortcut.*

**IMPORTANT:** The **Task Statistics** property section will NOT be displayed on the task properties page if the **Task Statistics** check box is NOT selected on the [Appearance](#) page of the Options dialog box.

### See also

[Keyboard Shortcuts](#)

## 6.13 Flags

You can mark a task with a flag. This is used to visually highlight tasks with icons and separate them from other tasks while grouping in the To-Do list.

### To assign a flag to a task:

1. Make sure that the Flag column is displayed in the task list. If it is not, Right-click on the task tree header and select Flag.
2. Select task(s) you want to flag
3. Right-click in the Flag column and select a flag.

You can customize the flag list and assign any icon to a flag.

### To customize the flag list

1. Click Tools > Manage Flags... to open the **Manage Flags** dialog.
2. To add a new flag, right-click in the flag list and select **New Flag...**
3. To delete a flag, right-click in the flag list and select **Delete Flag**
4. To change a flag's position, drag and drop the flag in the list
5. To assign a new icon to a flag, click the **Icon...** button and select an icon from the list in the **Select Icon** dialog..

***Tip:** in the **Manage Flags** dialog, you can assign a shortcut to a flag and use it to flag tasks quickly while editing them in the task list.*

***Tip:** to add new icons to the **Select Icon** dialog, click **Load from file...** and select an icon from the file.*

*Please note that MLO supports only 16x16,24x24,32x32 32-bit images in the .ico format.*

**See also**

[Assigning Contexts to a Task](#)  
[Starred](#)

## 6.14 Starred

You can mark a task with a star by clicking on the corresponding column in the list. This is used to include tasks in a special [Starred](#) view.

***Tip:** If the Starred column is not visible just right click on the header and select it from the list.*

**See also**

[Assigning Contexts to a Task](#)  
[Flags](#)  
[Starred view](#)

## 6.15 Advanced Task Properties

In the Advanced Task Properties dialog, you can edit task properties like completion date and custom [AutoArchive](#) settings for current task.

**How to open Advanced Task Properties dialog**

1. On the **Task** menu, click **Advanced** and then click **Properties...**

**System properties tab****Created****Modified****Completed**

Dates of creation, modification and completion of the selected task.

**Task ID**

Internal task ID.

**AutoArchive tab****Do not archive tasks in this branch**

If this option is set, the current tasks and all subtasks will not be archived during AutoArchive.

**See also**

[Archiving Using AutoArchive](#)  
[Task properties](#)

# Chapter

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VII

## 7 Contexts

### Understanding Contexts

Many tasks can be completed only in certain Contexts (or situations). For example you can complete task "Buy the compact disk" only when you are in the music store. So you can create new Context "Music store" and [assign](#) this Context to the task. Now you can select Context "Music store" in the **Context** filter to see only tasks assigned to this Context.

You can also think of the Contexts as categories for the tasks.

Each Context can also [include](#) other Contexts in the hierarchy.

Each Context can have an [open/closed schedule](#).

You can create, rename, delete and assign parameters for Contexts in **Manage Contexts** dialog. To open this dialog select menu *Tools > Manage Contexts...*

### See also

[Creating and Deleting Contexts](#)

[Assigning Contexts to a Task](#)

[Filter Controls](#)

## 7.1 Creating and Deleting Contexts

### To create a Context:

1. Select menu *Tools > Manage Contexts...* or click F8 to open the **Manage Contexts** dialog
2. Right-click on the list of Contexts to open the local menu and select the **New Context** command
3. Enter a name for new Context

**Tip:** You can use the **Insert** keyboard shortcut to create a Context

### To delete a Context:

1. Select menu *Tools > Manage Contexts...* or click F8 to open the **Manage Contexts** dialog
2. Select the Context(s) you want to delete
3. Right-click to open the local menu and select the **Delete Context** command

**Tip:** You can use the **Del** keyboard shortcut to delete Context(s)

**Note:** In all tasks that have the Context being deleting, the Context will be removed or replaced with another Context depending on the option you select in the confirmation dialog.

**Note:** Included Contexts will not be deleted but will be disconnected from the deleted Context

### See also

[Included Contexts](#)  
[Assigning Contexts to a Task](#)

## 7.2 Included Contexts

Each [Context](#) may include other Contexts. This can form a hierarchy of contexts.

For example Contexts "Phone" and "Internet" can be included by the Context "Work" as well as by the Context "Home".

So imagine that you have a task "Call Bob" which is assigned to the Context "Phone". If you select "Home" in the **Context** filter you will see this task in the to-do list. This is because Context "Home" has Context "Phone" included. The same situation will happen if you select "Work" in the **Context** filter: you will see "Call Bob" in the to-do list because this task is assigned to Context "Phone" which is included by the selected Context "Work".

### To include Contexts in another Context:

1. Select menu *Tools > Manage Contexts...* or click F8 to open the **Manage Contexts** dialog
2. Select a Context that will include other Contexts.
3. Set included Contexts on the **Included Contexts** tab

### See also

[Creating and Deleting Contexts](#)  
[Assigning Contexts to a Task](#)  
[Filter Controls](#)

## 7.3 Context Hours

A Context may have a schedule: specific times during which it is open or closed. If a Context you select as a To-Do filter is closed at the moment, the tasks associated with this Context will NOT be shown in the To-Do list, unless you check the **Include closed** check box in the Context filter group.

### To set Open/Closed schedule for a Context

1. Select menu *Tools > Manage Contexts...* or click F8 to open the **Manage Contexts** dialog
3. In the Manage Contexts dialog, select the **Hours** tab
4. Click and drag the mouse in the Context open/closed schedule to set open and closed times.

***Note:** The green line in the calendar shows the current time.*

### See also

[Contexts](#)  
[To-Do filtering by a Context](#)

## 7.4 Context Options

Additional parameters can be set for a Context on the Properties tab in Manage Contexts dialog.

**Hide this Context in the To-Do list Context filter**

If this option is set, the Context will not be shown in the Context filter list on the filter pane.

**Hide this Context in the task properties Context selector**

If this option is set, the Context will not be shown in the **Context Selector** for task Contexts option.

**Hotkey**

You can specify a hotkey to toggle the context for a task.

***Tip:** if you assign the identical hotkeys for different contexts then a local menu with the list of all these contexts will be shown when this hotkey is pressed.*

# Chapter

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VIII

## 8 Keyboard Shortcuts

The MLO team pays special attention to accelerating application usage. There are keyboard shortcuts for frequently used operations. The most important keyboard shortcuts are listed below.

**Note:** *Not all keyboard shortcuts are listed here. Please investigate the application menu, local menus, and hints to find out the shortcut for the operation you need.*

Shortcut	Action or command
Alt+F1	<b>Task views pane</b> open/close
Alt+F2	<b>Properties pane</b> open/close
F12	<b>Full screen</b>
Alt+1	Toggle between Task List and Task Notes (Contexts List and Contexts Notes)
Alt+2	<b>General</b> properties section open/close
Alt+3	<b>Timing &amp; Reminder</b> properties section open/close
Alt+4	<b>Effort</b> properties section open/close
Alt+5	<b>Project</b> properties section open/close
Alt+6	<b>Dependencies</b> properties section open/close
Alt+7	<b>Format</b> properties section open/close
Alt+8	<b>Review</b> properties section open/close
Alt+9	<b>Task Statistics</b> properties section open/close
F6	Collapse entire task list
F7	Expand entire task list
F3	Open current workspace in new window
Alt+Shift+Left	Rearrange tasks in the outline
Alt+Shift+Right	
Alt+Shift+Up	
Alt+Shift+Down	
Ctrl+Up	Select next/previous visible task without focusing this task list. The current active control will be still focused during task change by this shortcut. Useful to iterate quickly through the list of tasks and change specific task parameter.
Ctrl+Down	Select next/previous sibling in the current outline
Alt+Up	
Alt+Down	
Ctrl+Alt+Up	Select next/previous project in the current outline
Ctrl+Alt+Down	
Ctrl+`	Collapse/Expand all subtasks of the current task
Shift+Ctrl+0	Set quick bookmark #1, 2...9 to a task in the outline
Shift+Ctrl+1	
...	
Shift+Ctrl+9	
Ctrl+0	Go to bookmark #1, 2...9 in the outline
Ctrl+1	
...	
Ctrl+9	
Ctrl+<	Go to previous/next bookmark set
Ctrl+>	
Ctrl+Alt+>	Open Bookmarks dialog
Alt+C	Edit Context for a task
Alt+L	Select <b>Context</b> for a task from the list
Alt+V	Select <b>View</b>
Alt+P	Toggle complete subtasks in order
Alt+Y	Toggle hide in todo



Alt+R	Reminder
Alt+J	Toggle "This is a Project"
Alt+X	Max time required
Alt+W	Toggle Weekly goal
Alt+D	Set Due Date for a task
Ctrl+=	Increase/decrease task due date by one day.
Ctrl+-	
Ctrl+Alt=	Increase/decrease task due date by one week.
Ctrl+Alt-	
Insert	Create a task (Context)
Alt+Insert	Create a subtask
Ctrl+Del	Delete a task (Context)
Ctrl+R	<a href="#">Zoom-in</a>
Ctrl+Alt+R	Zoom-out
Alt+Left	Jump back/forward to previously selected task
Alt+Right	Jump forward to the next task in history
Ctrl+H	Highlight a task

The list of the shortcuts is not complete here. Please discover other shortcuts in the application main menu, local menus, and hints to the commands. In task properties, press Alt to see underlined chars which are the shortcuts for corresponding commands.

**Note:** You can change the default keys or key combinations assigned to the common MLO functions or commands. For more information, see [Hot Keys](#).



# **Chapter**

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**IX**

## 9 More Advanced Features

### 9.1 Automatic Formatting

Automatic Formatting uses rules to format tasks individually, based on their properties.

For example, you may want to underline and set an icon for all the tasks that were created this week and contain the word "report" in the subject. Below is how you can do this.

#### To create a custom Automatic Formatting rule

1. Click menu **Tools > Options...**, select the **Automatic Formatting** page, and click **Automatic Formatting Rules...**
2. To create a new rule, click **Add...** in the **Automatic Formatting** dialog and then edit the rule name in **Rule name** text input.
3. Click **Condition...** to set rules for the tasks to be formatted
4. In the **Setup AutoFormat Rule** dialog create two rules:
  - 4.1. For tasks created this week:
    - 4.1.1 Click **Add rule**
    - 4.1.2 Select field **CreatedDateTime**
    - 4.1.3 Select condition **This week**
    - 4.1.4 Make sure that operation **And** is selected for the next rule.
  - 4.2 For tasks with the word "report" in the caption:
    - 4.2.1 Click **Add rule**
    - 4.2.2 Select field **Caption**
    - 4.2.3 Select condition **Contains**
    - 4.2.4 Type 'report' in the text input
  - 4.3 Click **OK** to close the condition editor dialog
5. Click the **Format...** button to add formatting for the tasks you selected.  
In our example check the **Underline** check box in the **Color Coding** dialog and click **OK**.
6. Click **Icon...** and select an icon you want add for the tasks.  
*Tip: You can add your icons to the list by clicking **Manage icons...***
7. Type the icon position where the icons should be displayed.  
Type 1 or 2 or 3 etc to display the icon in the corresponding position in the **Icons** column  
Type 0 to display the icon before the task caption in the task tree.
8. In the **Icon hint**, you can type text which will be displayed as the hint for the icon.  
For example "Report tasks created this week".
9. Click **OK** to close the **Automatic Formatting** dialog and **Close** to close Options.

Now you can see that all the tasks with the specified conditions are underlined and have the icon you set.

**Note:** Automatic Formatting will overwrite theme settings but will **not** change any custom formatting set on a task in the Format property section.

**Note:** The position of the rules in the Automatic Formatting dialog is important when you set different rules for the same formatting. In this case if the first rule is applied for the task then the second rule for the same formation will not be used. The rules which change other formatting will be still used. To change the position of the rule just use Drag & Drop

For example you may define two rules which set different icons to the **same** position.

Rule1: If Task created today set icon **New** to position 1.

Rule2: If Task caption contains "!" set icon ! in position 1

The rules will work this way:

If the task was created today and contains "!" in the caption, you will see icon **New** since Rule1 overwrites Rule2 for icon position 1

If the task was created yesterday and contains "!" in the caption you will see icon ! since Rule1 does not work and Rule2 is used to place the icon to position 1

**Note:** The **Icon type** in the Automatic Formatting dialog contains predefined types of the icons with the following behaviour:

Dependency: This icon type displays task dependency in the hint and opens the dependency editor if you click on this icon

Goal: This icon type displays the goal type in the hint.

Notes: This icon type displays task notes in the hint and opens the notes editor if you click on this icon

Reminder: This icon type displays reminder details in the hint and opens the reminders editor if you click on this icon.

(Custom): This icon type displays the text you entered for the hint.

**Tip:** By default there are several optional rules that are disabled in the Automatic Formatting dialog. For example there are rules that display icons for new tasks or mark the tasks you edited recently. You may want to enable these rules to see how they work.

#### See also

[Themes and Formatting](#)

[Custom Formatting](#)

## 9.2 Synchronization

You can synchronize the tasks contained in an MLO data file with:

- **[MyLifeOrganized Cloud](#)** (recommended) - Use this type of synchronization to sync your tasks between different devices in which you are using MyLifeOrganized task manager. This way you can wirelessly sync your tasks on PC with iPhone/iPod/iPad, Android, BlackBerry or Windows Mobile device. You can perform synchronization anytime and in any location while you have Internet connection. You can also share your tasks with other people located anywhere or even work together on the same project. Low cost subscription required to use MLO Cloud: <https://sync.mylifeorganized.net>
- **[WiFi sync](#)** allows you to synchronize MLO-Windows with MLO on mobile devices (such as iPhone) connected to the same WiFi network. The data transfer performed to your device directly. It works faster than Cloud however you can sync only if you located near your PC with MLO-Windows running on it.

- [Tasks stored in another MLO data file, which is located on another computer on the LAN or on an FTP server](#) - You can use this type of synchronization if you collaborate with other people on the same projects or tasks.

*Tip: this type of synchronization is not recommended anymore since entire file transferred on each sync.*

*Use **MLO Cloud** instead since it works better sending only updates to/from the Cloud and handling conflicts.*

- [Tasks stored in another MLO data file, which is located on removable media \(such as a USB flash drive\)](#) - Choose this type of synchronization for various portable scenarios such as working on tasks both at work and home or working on tasks during travel.

*Tip: **MLO Cloud** works better for these portable scenarios if you have Internet connection*

- [Tasks stored in MLO BlackBerry using USB connection](#) - Use this type of synchronization if you want to synchronize tasks between MLO Desktop and MLO BlackBerry connected using USB.

*Tip: It is recommended to use **MLO Cloud** instead if you want to use over the air synchronization*

- [Microsoft Outlook data](#) - Use this type of synchronization if you want to synchronize your tasks with Microsoft Outlook data or the Outlook GTD Add-in through Outlook. Using [advanced filtering](#) you can select a list of tasks which should be synced to Outlook.

*Note: Microsoft Outlook does not support hierarchy of tasks so after the sync your hierarchy is stored only in MLO and Outlook will contain tasks you selected for sync in plain list*

**See also:**

[Synchronization profiles](#)

[Adding a Synchronization Profile](#)

## 9.2.1 Synchronization profiles

This section of the help documentation describes how to configure synchronization profiles to sync with:

- 1) MLO Cloud sync service
- 2) Your FTP server
- 3) BlackBerry connected to USB
- 4) Other MLO data file located on local computer, flash drive or LAN.

See also the following synchronization types which described in other sections:

[WiFi Synchronization](#)

[Synchronize to MS Outlook.](#)

### 9.2.1.1 Adding a Synchronization Profile

To synchronize one data file with another, you need to add a new *Synchronization Profile*. A Synchronization Profile specifies the synchronization parameters such as the name and location of the remote data file with which to synchronize the current (local) data file and the synchronization direction.

You can add a Synchronization Profile by using only the basic synchronization parameters or by using all the available parameters (both basic and advanced). Use only the basic synchronization parameters if you want to quickly add a new Synchronization Profile. Use both basic and advanced parameters if you want to fine-tune the Synchronization Profile to your specific needs.

***Tip:** Instead of adding a new Synchronization Profile, you can reuse an existing item by [importing that item](#) into the current data file from an MLO sync configuration file.*

**To add a Synchronization Profile using the basic parameters:**

1. On the **File** menu, click **Synchronization**.
2. Click **New** in the **Synchronization** dialog box.
3. On the **General** tab, specify the following basic synchronization parameters:

Parameter	Description
<b>Sync profile name</b>	Type a name for the synchronization profile
<b>Sync to MLO Cloud on the Internet</b>	<p>Select this option to sync your data to MLO Cloud sync service (subscription required).</p> <ol style="list-style-type: none"> <li>1. Click <b>Setup Connection</b> to specify the following Cloud settings <ul style="list-style-type: none"> <li><b>e-mail</b> - your MLO Cloud account email</li> <li><b>password</b> - your MLO Cloud account password</li> </ul> <p>Note: to create new account click <b>Create new account in MLO Cloud</b> and follow instructions.</p> <p>To configure advanced parameters such as Proxy click <b>Advanced &gt;&gt;</b></p> </li> <li>2. Click <b>Browse...</b> to select or create new MLO Cloud data file you want to sync with.</li> </ol>
<b>Sync to remote data file located on my FTP server</b>	<p>Select this option if the data file with which you want to synchronize the current file is stored on a FTP server (if you do not want to use Cloud). Do the following:</p> <ol style="list-style-type: none"> <li>1. Click <b>Setup FTP</b> and specify the following FTP settings in the <b>FTP Connection Details</b> dialog box: <ul style="list-style-type: none"> <li>• <b>Hostname</b> - Type the host name of the FTP sever.</li> <li>• <b>Username</b> - Type your FTP user name.</li> <li>• <b>Password</b> - Type your FTP password.</li> <li>• <b>Port</b> - Specify the port number of the FTP server (normally, 21).</li> </ul> <p><b>Note:</b> If the FTP server is behind a firewall and you have trouble synchronizing with the data file on the server, selecting the <b>Use passive FTP</b> check box may help.</p> </li> <li>2. If you use a proxy server to connect to the FTP server, specify the proxy server settings under <b>proxy server details</b>: <ul style="list-style-type: none"> <li>• <b>Hostname</b> - Type the host name of the proxy</li> </ul> </li> </ol>

server.

- **Username** - Type your proxy login user name.
- **Password** - Type your proxy login password.
- **Port** - Type the port number of the proxy server.
- **Proxy type** - Select a proxy server type.

3. Click **Test FTP settings** to check whether MLO can connect to the FTP server using the specified settings. If the connection has been established, MLO displays a "Logged in successfully" message. If the connection attempt has failed, MLO displays a corresponding error message. Correct the FTP settings and click **Test FTP settings** again.

#### Sync to BlackBerry connected to USB

4. Click **OK** to return to the **Sync Item** dialog box.

Select this option to sync your data file with MLO-BlackBerry data file using USB connection if you do not plan to use MLO Cloud.

1. Connect your BlackBerry device to USB cable
2. Click **Browse...** to browse to the remote database on MLO-BlackBerry.

#### Sync to other data file located on my computer, flash drive or LAN

Select this option if the data file with which you want to synchronize the current (local) file is stored on the same computer, within the same local-area network (LAN), or on a USB flash drive (if you do not plan to use Cloud).

Click **Browse** to browse to the remote file.

4. Click **OK**.

#### To add a synchronization profile using all the parameters (basic and advanced):

1. Complete the "To add a Synchronization Profile using the basic parameters" procedure above to specify the basic synchronization parameters.
2. Select the **Add this sync item to quick synchronization** check box to be able to [quickly synchronize the data files](#) using this Synchronization Profile.
3. Select **Sync automatically this cloud profile** to sync this profile with MyLifeOrganized Cloud [automatically](#).
4. Click the **Branch sync** tab and select one of the following options:
  - **Synchronize all tasks** - Select this option if you want to synchronize all the tasks in both data files.
  - **Synchronize only selected branch of tasks** - Select this option if you want to synchronize only a specific branch of the task tree (a particular task and its subtasks). Specify whether the task branch is contained in the local or remote file. Next, click **OK**, select the branch in the Outline and click **OK** again. The **Branch of task to sync** box displays the name of the selected branch.

**Note:** If the selected task branch exists only in one file, it will be added to the



other file as a result of the synchronization.

**Note:** The option to sync branch does not work for cloud sync.

- Click the **Advanced** tab and specify the following settings:

Setting	Description
<b>Sync direction</b>	Specify the direction of synchronization: <ul style="list-style-type: none"> <li>• <b>Bidirectional (recommended)</b> - The changes to the task data contained in both data files will be retained, and the files be updated with each other's changes.</li> <li>• <b>Local to Remote</b> - The remote file's task data will be updated with the local file's task data.</li> <li>• <b>Remote to Local</b> - The local file's task data will be updated with the remote file's task data.</li> </ul>
<b>Do not sync reminders</b>	Select this check box to synchronize the data files without copying the reminders set within the tasks. Clear this check box to copy the reminders during synchronization.
<b>Do not sync contexts</b>	Do not sync corresponding properties of the task. These options may be needed when you setup collaboration and want to keep some parameters of the task private and do not sync them to other data files.
<b>Do not sync flags</b>	
<b>Do not sync star</b>	
<b>Do not sync color coding</b>	
<b>Do not sync goals</b>	Use this option to resynchronize all the tasks in both files. For more information about resynchronization, see <a href="#">Synchronizing Data Files</a> .
<b>Re-synchronize</b>	

- Click **OK**.

The new Synchronization Profile is added to the Synchronization Profiles table in the **Synchronization** dialog box. The **Sync Profile** column displays the names of the Synchronization Profiles. The **Last Synchronized** column indicates the last time that synchronization was performed using the Synchronization Profile.

For information about synchronizing data files using a Synchronization Profile, see [Synchronizing Data Files](#).

**See also:**

- [Synchronizing Data Files](#)
- [Editing a Synchronization Profile](#)
- [Deleting a Synchronization Profile](#)
- [Importing and Exporting Synchronization Profiles](#)

### 9.2.1.2 Synchronizing Data Files

You can synchronize necessary data files by using an appropriate Synchronization Profile.

You can quickly synchronize data files if a Synchronization Profile has been defined for them and that item has been designated for quick synchronization. To define a Synchronization Profile, see [Adding a Synchronization Profile](#). To designate a Synchronization Profile for quick synchronization, select the appropriate item in the **Synchronization** dialog box, click **Edit** and then select the **Add this sync item to quick synchronization** check box on the **General** tab.

You have any problems synchronizing the data files, resynchronizing them may help. Resynchronizing lets you re-apply synchronization to all the tasks in both files.

#### To synchronize data files using synchronization profile:

1. On the **File** menu, click **Synchronization**.
2. In the **Synchronization** dialog box, select the appropriate synchronization profile and click **Sync Now**.  
If the data files have been synchronized successfully, the MLO status bar displays "Synchronized."  
If the synchronization has failed, the **Sync** dialog box details the error. Correct the error and repeat this procedure.

***Note:** If you have selected more than one Synchronization Profile, MLO will synchronize the data files defined in the selected synchronization profiles sequentially, in the order that the synchronization profiles are listed in the **Synchronization** dialog box.*

***Important:** If the files being synchronized specify conflicting task information, MLO displays the details of the conflict in a dialog box. You must resolve the conflict to complete the synchronization. For information about resolving synchronization conflicts, see [Resolving Synchronization Conflicts](#).*

#### To quickly synchronize data files:

- Do one of the following:
  - On the **Tools** menu, click **Synchronize**.
  - Press customizable shortcut (default F9).

If the data files have been synchronized successfully, the **Sync** dialog box displays "Synchronized."  
If the synchronization has failed, the **Sync** dialog box details the error. Correct the error and repeat this procedure.

#### To resynchronize data files:

1. In the **Synchronization** dialog box, select the appropriate Synchronization Profile and click **Edit**.
2. In the **Sync Profile** dialog box, click the **Advanced** tab and then click **Re-synchronize**.
3. In the **Confirm - MyLifeOrganized** message box, click **Yes**.
4. Click **OK** in the **MyLifeOrganized** dialog box and then in the **Sync Profile** dialog box.
5. Click **Sync Now**.

#### See also:

- [Resolving Synchronization Conflicts](#)
- [Adding a Synchronization Profile](#)
- [Editing a Synchronization Profile](#)

### 9.2.1.3 Editing a Synchronization Profile

You can edit a Synchronization Profile to adjust some of an item's parameters. For example, the location of the remote file that you synchronize the local file with has changed, and you need to update the path to the remote file.

#### To edit a Synchronization Profile:

1. On the **File** menu, click **Synchronization**.
2. In the **Synchronization** dialog box, select the item that you want to edit and click **Edit**.
3. Change the synchronization parameters on the **General**, **Branch sync**, and **Advanced** tabs as needed and click **OK**.

***Note:** For a description of the synchronization parameters, see [Adding a Synchronization Profile](#).*

See also:

- [Adding a Synchronization Profile](#)
- [Synchronizing Data Files](#)
- [Deleting a Synchronization Profile](#)
- [Importing and Exporting Synchronization Profiles](#)

### 9.2.1.4 Deleting a Synchronization Profile

You can delete a Synchronization Profile that you no longer need.

#### To delete a Synchronization Profile:

1. On the **File** menu, click **Synchronization**.
2. In the **Synchronization** dialog box, select the item that you want to delete and click **Delete**.
3. In the **Confirm - MyLifeOrganized** message box, click **Yes**.

See also:

- [Adding a Synchronization Profile](#)
- [Editing a Synchronization Profile](#)

### 9.2.1.5 Importing and Exporting Synchronization Profiles

You can use a Synchronization Profile defined in another data file and previously saved as an MLO sync configuration file (a file with the *misc* extension) by loading that sync configuration file into the current data file. This process is called importing a Synchronization Profile.

You can reuse a Synchronization Profile defined in the current data file, in another data file by saving the item as an MLO sync configuration file, placing the file in an appropriate location, and then loading (importing) it from that location into the other data file. This process is called exporting a Synchronization Profile. Exporting is useful if you want to share the Synchronization Profile with other

people. By exporting the sync configuration file to a location on your computer or another computer on the local-area network (LAN), you enable other users to access it and use the Synchronization Profile it contains.

***Note:** You can export more one Synchronization Profile in a sync configuration file.*

#### **To import a Synchronization Profile:**

1. On the **File** menu, click **Synchronization**.
2. In the **Synchronization** dialog box, click **More>Import**.
3. Locate the MLO sync configuration file that contains the Synchronization Profile that you want to import.
4. Click **Open**.  
The Synchronization Profile is added to the Synchronization Profiles table in the **Synchronization** dialog box. The **Sync Name** column displays the name of the Synchronization Profile. You can immediately use the Synchronization Profile to synchronize the data files it specifies (see [Synchronizing Data Files](#)) or edit the item before using it (see [Editing a Synchronization Profile](#)).

#### **To export a Synchronization Profile:**

1. On the **File** menu, click **Synchronization**.
2. In the **Synchronization** dialog box, select the Synchronization Profiles that you want to export.
3. Click **More>Export**.
4. In the **Save MLO Sync Config** dialog box, browse to the location where you want to place a new mlsc file and type a name for the file in the **File Name** box.
5. Click **Save**.  
The file is now available from the selected location for importing into another data file.

#### **See also:**

- [Adding a Synchronization Profile](#)
- [Editing a Synchronization Profile](#)
- [Synchronizing Data Files](#)

## **9.2.2 Synchronization with MyLifeOrganized Cloud**

[MyLifeOrganized Cloud Sync service](#) allows you to synchronize your data between different devices in which you are using MyLifeOrganized task manager.

You can add your tasks in MLO-Desktop then get them on your MLO-iPhone, MLO-iPad, MLO-Android, MLO-BlackBerry, MLO-PocketPC or other MLO-Desktop over the air with a single click and then sync updated tasks back to MLO-Desktop.

With MLO Cloud you can share your task list with other people located anywhere or even [work together](#) on the same project.

MLO Cloud Sync service takes precautions to protect your information both online and off-line. Periodical backups of your data stored in secure and robust MLO Cloud environment.

To configure MLO-Desktop to sync with MLO Cloud follow [the instructions to create new sync profile](#) and select option **Sync to MLO Cloud on the Internet**.

By default your cloud sync profile configured to [sync automatically](#) with MyLifeOrganized Cloud.

**See also:**

[Synchronization profiles](#)

[Adding a Synchronization Profile](#)

[Collaboration using MLO Cloud](#)

[WiFi Synchronization](#)

[Automatic sync with Cloud](#)

### 9.2.2.1 Automatic sync with Cloud

When you [configure](#) the synchronization with [MyLifeOrganized Cloud Sync service](#) it is set to sync automatically with the cloud by default. When this option is set MyLifeOrganized keeps your desktop data in sync with Cloud.

There is a special algorithm designed to optimize the number of requests to the server while still have your changes from the cloud when you need them on desktop and send changed back to the cloud when you need them on your devices. This algorithm also minimizes possible conflicts by prevent the sync in the same time when you are editing your data file on desktop.

**Here is the full algorithm of the autosync in MyLifeOrganized for Windows.**

1. When MLO is started (or new data file is opened) the check for the cloud changes initiated. If there are cloud changes the autosync is started immediately (to get modifications from the cloud before you start working with MLO on desktop).
2. When MLO is being closed (or current data file is being closed) and there are local modifications the autosync is started (to send local modifications to the cloud).
3. If MLO is running and there is full inactivity on your computer for 8-10 min and there are local modifications the autosync is started (to send the local modifications to the cloud after you have already left your computer).
4. If MLO is running and there was inactivity on your computer for more than 10 min and you started using the computer after this long inactivity the check for the cloud changes initiated. If there are cloud changes the autosync is started (to get possible modifications from the cloud before you continue working with MLO on desktop)
5. If MLO is running but has not been used for more than 10 min and you started using MLO after this long delay the check for the cloud changes initiated. If there are cloud changes the autosync is started (to get possible modifications from the cloud before you continue working with mlo on desktop)

**There are the following special cases for the autosync algorithm:**

6. If there are more than 150 modifications on the cloud, the sync on first start (1) is not initiated automatically to prevent long delay on MLO start. The sign that there are modifications on the cloud will still be shown in the toolbar so that you could decide when to get these modifications manually.
7. If there are critical errors detected during the sync, the autosync will stop initiating the sync automatically. The “sync error” sign will be displayed in MLO toolbar. The critical errors are: conflict,

cloud account expired, invalid login.

8. If there are non-critical errors detected during sync (for example connection to the cloud lost) the autosync will continue the attempts to complete the sync. The “sync error” sign will be displayed in MLO toolbar until sync succeeded.

9. On each MLO window activation the check for the cloud modifications is initiated and special sign is displayed in the toolbar if there are cloud modifications. The sync is not started unless other conditions of the algorithm are met (1-5).

**Note:** *The current implementation of the algorithm may show you a conflict window if you continue editing a task while sync is in progress (for example notes editing). We plan to improve this issue. In the meantime it is recommended to try not to make changes to the tasks during sync process (usually several seconds).*

**See also:**

[Synchronization with MyLifeOrganized Cloud](#)

[Synchronization profiles](#)

[Adding a Synchronization Profile](#)

### 9.2.3 Synchronization with MLO BlackBerry

You can synchronize your tasks to MLO-BlackBerry application with one of the methods:

1) Using [MLO Cloud sync](#) (recommended).

**How to sync your BlackBerry device to MLO Cloud**

1. Run MLO-BlackBerry application and open a database  
IMPORTANT: if you have already synced your tasks to Cloud using MLO-Desktop then create new empty database on MLO-BlackBerry and get your data from Cloud to avoid duplications.
2. Select menu Settings->Cloud Sync
3. Enter your MLO Cloud credentials
4. Select a file on MLO Cloud to sync with
5. Select Save
6. Select Synchronize from the main menu.

2) Using BlackBerry Device Manager and USB connection

**How to sync MLO Desktop with MLO-BlackBerry using USB connection**

1. Make sure BlackBerry Device manager is installed and running on your computer
2. Connect your BlackBerry Device to your computer
3. Run MLO on BlackBerry
4. Run MLO on Desktop
5. In MLO on Desktop select File->Synchronization...
6. Click New...
7. Enter the Sync profile name (for example “Bob’s BB USB Sync”)
8. Click “Sync to BlackBerry connected to USB”
9. Click “Browse...” and select file on the BlackBerry you want to sync with
10. Click OK to save your Sync Profile

11. Click Close to close Synchronization dialog
12. Click F9 (Tools->Synchronize) to sync to BlackBerry

**See also:**

[MyLifeOrganized Cloud](#)  
[Synchronization profiles](#)  
[Adding a Synchronization Profile](#)

## 9.2.4 WiFi Synchronization

WiFi Synchronization allows you to synchronize MLO-Windows with MLO on mobile devices (such as iPhone) connected to the same WiFi network. The data transfer performed to your device directly. You can sync only if you located near your PC with MLO-Windows running on it.

### How to sync your device with MLO-Windows on your PC using WiFi

1. Run MLO on your device (such as iPhone)
2. Run MLO on you PC, unblock it in Firewall and open your data file.
3. Pair your device with MLO-Windows on PC
4. Start WiFi sync from your device

Look at this [online guide](#) for step-by-step WiFi sync instructions.

**Note:** MLO WiFi module should be installed on your PC. If it is not installed run the MLO installation again and select it.

**Note:**

*Each MLO data file on your PC can sync only to one profile on a single device.  
To sync your device with desktop the paired data file should be open in MLO-Windows*

*To sync this desktop data file to other profile on device or with other device you need to un-pair old profile from PC and pair new profile.*

**See also:**

[MyLifeOrganized Cloud](#)

## 9.2.5 Collaboration

Team of people can work together on the same project or tasks using MLO collaboration features:

- 1) [Collaboration using MLO Cloud](#) (recommended)
- 2) [Collaboration using sync to a hub file on LAN or FTP](#)

**See also:**

[Synchronization with MLO Cloud](#)  
[Synchronization profiles](#)

#### 9.2.5.1 Collaboration using MLO Cloud

You can share your MLO Cloud file with other Cloud users to work together on the same tasks or projects.

##### To share your MLO Cloud file

1. [Open your synchronization profile](#) which is synced with MLO Cloud.
2. Click **Browse...** button to show the list of your MLO Cloud files
3. Select a MLO Cloud file which you want to share with other MLO Cloud user(s)
4. Click **Properties...** button to open file details
5. Select **Sharing** tab
6. Click **Share...** button and enter MLO Cloud user login you want to share your file with.
7. Click OK.
8. Click OK in Cloud Sync File Properties dialog
9. Click Close in MLO Cloud Sync Files dialog.

***Tip:** to remove sharing with specified user click [Remove Sharing...](#) button in Cloud File properties dialog.*

##### See also:

[Synchronization with MLO Cloud](#)

[Adding a Synchronization Profile](#)

#### 9.2.5.2 Collaboration using sync to a hub file on LAN or FTP

Several people can work on the same project or tasks using sync to a hub file located on LAN or your FTP.

***Note:** this method is outdated and [MLO Cloud sync](#) is recommended for collaboration now.*

MLO enables small and medium-sized teams to efficiently collaborate on projects and tasks by using the synchronization feature. Managers can use this feature to centrally manage and track projects. Team members can use the synchronization functionality to report on the progress of assigned tasks and ensure that changes they made to their tasks are shared with the entire team.

To successfully collaborate using MLO, the team members must perform the following steps depending on their role within the team.

##### Manager's Setup

1. [Create an MLO data file](#) and [add tasks and subtasks](#) to the file to represent a hierarchy of projects and related tasks.
2. Create another data file in an appropriate location on the LAN or on an FTP server. This data file is used as a shared database file which serves the sync hub.
3. [Add a Synchronization Profile](#) to be able to synchronize his or her data file with an MLO file located on the LAN or an FTP server.
4. [Synchronize his or her MLO data file with the one located on the LAN or an FTP server.](#)

The manager can get the most up-to-date information on the progress of the assigned tasks and thus calculate the percentage completion for the entire project by regularly synchronizing his or her file with the one located on the LAN or a FTP server.

##### Each Subordinate's Setup



1. [Create an MLO data file.](#)
2. [Add a Synchronization Profile](#) to be able to synchronize his or her data file with the MLO file located on the LAN or a FTP server.
3. [Synchronize his or her MLO data file with the one located on the LAN or an FTP server.](#)

The team members can report to the manager on the current progress of the assigned tasks by synchronizing his or her file with the one on the LAN or an FTP server at agreed intervals.

**See also:**

[Collaboration using MLO Cloud](#)

[Adding a Synchronization Profile](#)

[Synchronizing Data Files](#)

[Editing a Synchronization Profile](#)

[Deleting a Synchronization Profile](#)

[Importing and Exporting Synchronization Profiles](#)

## 9.2.6 Synchronization for Portable Scenarios

The synchronization feature of MLO enables users to manage tasks in various portable scenarios, that is, those situations that involve using removable media such as a USB flash drive. Examples of portable scenarios:

- Working on tasks at work and home and using a USB flash drive to synchronize the tasks between the office and home computers.
- Synchronizing the tasks stored on the office computer with the ones on removable media to make it possible to work on the tasks on business travel.

To synchronize tasks in portable scenarios, perform the following steps:

1. [Add a Synchronization Profile.](#)

**Note:** Be sure to select the **Sync to other data file located on my computer, flash drive or LAN** check box in the **Sync Profile** dialog box.

2. [Synchronize the data files](#) containing the tasks.

**Tip:** [MLO Cloud](#) works better for these portable scenarios

**See also:**

[Synchronization with MLO Cloud](#)

[Resolving Synchronization Conflicts](#)

### 9.2.7 Resolving Synchronization Conflicts

A synchronization conflict refers to a situation when changes were made to a specific property (for example, task due date or importance) of the same task or subtask in both data files before synchronization, which results in different values of that property in the files and prevents the synchronization from being completed. To resolve a synchronization conflict, you need to specify which file—local (current) or remote—takes precedence. For example, if both files include different due dates for the same task, you can specify that the due date in the local (current) file overrides the due date from the remote file, or vice versa.

If MLO-Desktop detects that the data files include conflicting information, it displays the **Resolve Sync Conflict** dialog box, which giving details of the conflict, and prompts you to resolve the conflict before continuing with the synchronization. If more than one task in the data files gives conflicting information, a separate row is displayed for each task in the **Resolve Sync Conflict** dialog box.

#### To resolve a synchronization conflict:

1. To identify the conflicting information, click an ellipsis in the **Details** column in the **Resolve Sync Conflict** dialog box.  
The **Task Difference** dialog box lists all the task properties, and the properties that specify the conflicting information are highlighted in red. The **Local data** and **Remote data** columns display the conflicting values in the local file and remote file respectively.
2. Click **Close** to return to the **Resolve Sync Conflict** dialog box.
3. In the **Action** column, select one of the following values:
  - **Replace -->** - Select this value to override the information in the remote file with the corresponding information in the local file.
  - **<-- Replace** - Select this value to override the information in the local file with the information in the remote file.
4. Click **OK**.  
MLO complete the synchronization using the task property values of the data file specified to take precedence.

***Tip:** for multiple update select all the tasks in Resolve Sync Conflict window, right click to open Local Menu and select conflict resolve action.*

**See also:**

[Synchronizing Data Files](#)

### 9.2.8 Outlook Sync User Manual

This manual will help you in setting up synchronization between MyLifeOrganized (MLO) and Microsoft Outlook. You might want to synchronize with Outlook if you are a power Outlook user

and want to use Outlook together with MLO in your planning. Note that the task synchronization feature is available in the desktop version of MLO only.

MLO Outlook Sync supports three preset modes:

1. Basic Mode
2. Standard Palm User Mode
3. Advanced Outlook Mode

Also supported is a Custom mode for those users from whom none of the three modes is appropriate.

MLO currently synchronizes only with Outlook tasks.

Most of what you need to know about MLO Outlook Sync, and what you will spend the bulk of your time with, involves the setup and configuration of the Outlook Sync module. Once you have set it up the way you want it, things should work relatively seamlessly. Section 2 of the manual, which comprises the bulk of the document, explains how to set things up, as well as the consequences of making various choices during configuration. Section 3 contains additional random notes and explanations, as well as troubleshooting help.

#### 9.2.8.1 1. Performing the Synchronization

To synchronize MLO and Outlook tasks with **default sync settings**:

- 1) go to menu **File | Outlook synchronization...**
- 2) select the **Task Synchronization Action** (i.e. MLO<-->Outlook)
- 3) click the "**Sync now**" button.

***Tip:** Once you have synchronization set up the way you want it, you can simply select "**Synchronize Outlook**" from the Tools menu, and synchronization will take place automatically, using the existing settings.*

**See also:**

[Setting Up MLO for Outlook Synchronization](#)

#### 9.2.8.2 2. Setting Up MLO for Outlook Synchronization

This section of the documentation describes how to perform advanced synchronization setup between MLO and Outlook. To set up MLO Outlook sync, click on the File menu and select “**Setup Outlook sync**”.

##### 9.2.8.2.1 2.1 Outlook Folder

The first thing you need to do is select the Outlook folder with which you will be synchronizing your MLO tasks. To do so, click on the Browse button in the initial dialog.

***Tip:** You will usually want to synchronize with the Tasks folder in your Outlook Personal Folders tree. If you are just a little squeamish, you might want to create a new folder in Outlook for your initial testing or to separate all your MLO tasks in Outlook. To do so, click on the New button and create it. Finally, click on the folder you wish to synchronize and click OK. The selected folder path should now be displayed in the text box.*

#### 9.2.8.2.2 2.2 Tasks synchronization action

Next, you will need to decide the direction of synchronization. You have three choices:

1. Outlook --> MLO (Copy Outlook tasks to MLO)– Typically, you will make this selection only when you are starting out and want to move your Outlook tasks into MLO so that you can work with them there. Once this is done, you will probably want to switch to one of the following actions. (See the suggestion below for the best way to make this change.)

***Note:** existing MLO tasks (not connected to Outlook) will not be affected in this mode.*

2. MLO --> Outlook (Copy MLO tasks to Outlook) – You will want to choose this action when you do not have existing Outlook tasks you want to work with and you want to copy your MLO tasks to Outlook. This action would also be appropriate if you want to use Outlook only for viewing your tasks and do not plan to ever make any changes to your tasks from within Outlook.

***Important:** once you perform the sync using this mode, all your Outlook tasks which are not connected to MLO will be **deleted** in this Outlook folder.*

3. MLO <--> Outlook (Synchronize tasks)– This action allows you to make changes to your tasks in either MLO or Outlook and to have these changes moved in both directions.

#### 9.2.8.2.3 2.3 Advanced sync options

After you have selected your Outlook synchronization folder and chosen the direction of synchronization you can click Advanced button to complete the setup.

##### 9.2.8.2.3.1 2.3.1 MLO Outlook Sync Presets

The **MLO Outlook Sync Presets** dialog is displayed automatically only if you enter Advanced mode the first time. You now need to make the decision as to which mode you will use for your synchronization. Later you can open this dialog again (click **Preset Modes** button in the **Outlook Sync Options** dialog) and change the preset mode.

If you are a Palm user and want to synchronize your MLO tasks with your PDA so that you can use the data when you are separated from the desktop, you will probably want to use the **Standard Palm User Mode** or the **Advanced Outlook Mode**. Using either of these modes, you will then be

able to make changes on your Palm and then move them back to MLO.

Choose **Standard Palm User Mode** if you are using only the native Palm PIM applications or tools (such as Datebk) that run on top of the native Palm databases. This mode allows MLO to map multiple data fields onto one field on the Palm in a way that allows filtering of the data on the Palm device without breaking the ability to perform bidirectional syncing between the Palm and MLO. If you are using advanced Palm tools such as KeySuite, you will want to choose **Advanced Outlook Mode**, which will allow you to sync a richer data set to your Palm PDA.

If you are not a Palm user, you will want to select any mode other than Standard Palm User Mode.

**Basic Mode** is the synchronization mode designed for people who simply want an easy way to shuttle data back and forth between Outlook and MLO. This mode makes minimal use of Outlook fields and features.

**Advanced Outlook Mode** provides advanced MLO data via Outlook's advanced and user-defined fields. The target audience is advanced users of the Outlook GTD Add-in tool and Palm power users that are using tools such as KeySuite and Beyond Contacts. Data is mapped in such a way as to leverage the advanced features of these various tools without breaking the ability to perform bidirectional syncing between the Palm and MLO.

After you have selected your preferred mode, the **Outlook Sync Options** dialog opens. This dialog includes four tabs with a variety of settings that you can change if you want to create a **Custom Sync Mode** different from any of the built-in presets. Custom Mode is intended for power users who are not satisfied with any of the standard presets. Custom Configurations can be saved to a **MLO Outlook Sync Settings** file - \*.mos (which is actually XML file) for future reuse and sharing amongst users. This mode allows you to configure the tool to meet specific unique needs that cannot be anticipated ahead of time. Custom Modes can be saved to named mos files.

(If you plan to work in one of the preset modes, you can skip the following information and go on to Section 3.0 – “Notes and Troubleshooting” )

#### 9.2.8.2.3.2 2.3.2 General Tab

##### 2.3.2.1 New Outlook tasks will be added to this root MLO task

If you create new tasks in Outlook, you might want to be able to easily find them in MLO so that you can then set MLO-specific properties. One way to do this is to synchronize all such tasks into a specific top-level task in MLO. To do so, just type the name of this task into the text box.

##### 2.3.2.2 Remove tasks from Outlook not visible in MLO To-Do View

If you set this option then only tasks visible in selected MLO To-Do view will be synced to Outlook. The rest of the tasks will be deleted on Outlook side.

##### 2.3.2.3 To-Do Visible option tracks Open and Closed Contexts

These two options allow Outlook and other tools to create a view of tasks similar to any MLO To-Do List View.

If this option activated the tasks visible in the selected MLO To-Do List View will be added to the Outlook and all the other tasks will be removed from Outlook during synchronization. Use

predefined view name <Default View: "Active Actions"> to sync only [Active Actions](#). If you check option track Open and Closed Contexts then tasks with assigned Contexts which are [closed](#) at the moment will not be synced to Outlook.

### 2.3.2.4 Sync reminders

Check this option to synchronize MLO reminders to Outlook reminders.

### 2.3.2.5 Conflict resolution

If you are synchronizing both ways and have made changes to the same item in both MLO and Outlook, MLO Outlook Sync needs to know how to resolve the differences. The drop-down box gives you three choices:

*Use MLO data* – The MLO item will overwrite the Outlook item.

*Use Outlook data* – The Outlook item will overwrite the MLO item.

*Add records to both sides* – Both versions of the item will be added to both MLO and Outlook.

If you check "Show warnings on conflicts", you will be shown a warning if an item has been changed in both MLO and Outlook. The log file will contain detailed records about all conflicts. You can want to analyze the conflicts and remove duplicated tasks from MLO or Outlook.

### 2.3.2.6 Encode MLO project name

A task's immediate parent project (its "primary project") can be encoded into the Outlook task subject during sync to Outlook.

**Note:** *This encoding supports a commonly used approach of individuals following the GTD™ philosophy via a scheme sometimes referred to as the "pigpod method" or "vanilla GTD". See the Palm\_GTD Yahoo group for extensive discussions of this topic.*

The primary project name is either prefixed or suffixed with the title of the MLO task. The available encodings are:

Notation	Location
[Project]	Prepended to subject
[Project]	Appended to subject
<Project>	Prepended to subject
<Project>	Appended to subject

### 2.3.2.7 System settings

#### *Use redemption library to avoid Outlook security warnings*

Check this option to use Outlook redemption library during sync process. The redemption library is needed only to avoid Outlook security warnings during sync process. You can download the redemption library from [www.MyLifeOrganized.net](http://www.MyLifeOrganized.net) and place it in the same with mlo.exe folder. The sync process is able to continue without redemption library however in some cases you can see the Outlook security warning message(s).

#### **Auto sync MLO with Outlook periodically**

Set this option to sync MLO with Outlook periodically using default settings configured for "Quick Outlook sync" command.

### **Allow Outlook sync only on this computer**

If enabled then MLO will sync with Outlook only on computer with specified name. It can be useful if you move the same data file between computers (work and home for example) and only the work computer should be synced with your Outlook.

#### 9.2.8.2.3.3 2.3.3 Outlook Categories Tab

Outlook uses categories to group related tasks. MLO does not use categories, but it does include the concepts of contexts and projects. You can choose whether or not you wish to have MLO contexts and projects synchronize to particular Outlook categories.

### **2.3.3.1 Do NOT sync MLO Contexts with Outlook categories**

If you prefer, you can completely disable the syncing of contexts and projects to Outlook Categories. Once this feature is disabled, MLO contexts and projects will not be coordinated during synchronization. However, several other legacy features become enabled that allow the selective filtering of which categories sync and how task deletions are processed, through the use of the two sub-options, described below. This mode exists for three reasons. First it is useful if you have Outlook tasks that you want to be moved to MLO when first starting. Second, it allows you to use the legacy sync behavior of MLO if you desire it. Lastly, this option provides a simple method for creating a backup copy of all MLO tasks within Outlook to any desired folder.

#### ***Sync only Outlook tasks containing this string in the category***

If you type a string of characters into this box, only Outlook tasks whose category includes this string will be synchronized. For example, if this box contains "MLO", tasks in the "MLO Task" or "MLO Project" Outlook categories will be moved to MLO, but tasks in the "Task" and "Project" categories will not be moved during sync process.

If you leave this box empty all Outlook tasks will be synced with MLO.

#### ***When a task is deleted in MLO...***

This option is enable is you typed process category described above. By making a selection from this dropdown box, you can choose to have tasks which have been deleted in MLO also be deleted in Outlook, or to have them moved to Outlook and assigned to a particular category specified in the following text box. For example, you can use a category such as "Deleted from M\_L\_O".

**Note:** *If you process all Outlook tasks during sync (substring for task category is empty) the only option for deleted in MLO task is available. corresponding tasks will be also deleted in Outlook.*

**Note:** *There is a limitation for Outlook category of deleted in MLO tasks. The delete category should not contain process category as substring. This rule will prevent deleted in MLO tasks appear in MLO again after sync.*

**Example:** *if you set the process category to "MLO" it is not allowed to set these strings to delete category: "Deleted in MLO ", "MLO\_Del" etc. You can enter the following strings: "Deleted in M\_L\_O".*

The following table summarizes the sub-options available:

Function	Execution
Filter Categories	Allow entry of arbitrary string. Only Outlook categories containing that string will be synced.
Deleted in MLO	Option 1 – Delete it in Outlook.
Deleted in MLO	Option 2 – Move it to an Outlook category specified by a string value.

### 2.3.3.2 Sync MLO Contexts and Projects with Outlook Categories

Tasks can be categorized in Outlook according to their contexts in MLO. When this option is activated, the task will be placed in a category mapped to each context associated with it. Since both MLO and Outlook allow multiple items in contexts and categories respectively, this mapping is very straightforward. If you do choose to synchronize MLO contexts and projects with Outlook categories, you have several options.

#### **Contexts**

***Assign Context categories only for To-Do visible tasks*** – When this option is checked, context categories will be assigned in Outlook to any tasks that appear in MLO's To-Do list. Tasks that are not current to-do's will not be assigned a context category. Tasks not currently visible in the to-do list will still be transferred to Outlook, but will not be assigned a context category. These non-actionable tasks can still be categorized by project, as described below.

***Add prefix for "Contexts" categories*** – If this box is checked, context categories will be created in Outlook, with a prefix added to each category name to identify it as an MLO context. The default is "Cntx:", but you can change this to "Context:" or any other prefix you prefer.

***Context reduction to 15 categories*** - The number of Outlook categories to which you sync MLO contexts can be restricted to 15. This special mode is designed to support the synchronizing of tasks from Outlook to PalmOS based PDAs running the legacy Palm applications, which support only 15 categories. If projects are synced to a reserved category (as described below), the restriction becomes 14 categories, with the 15<sup>th</sup> being consumed by the Reserved Projects category.

When you check this box, another dialog will open so that you can map needed MLO contexts to the 14 or 15 Outlook categories that you wish to be synchronized to Outlook. (You can also access this dialog by clicking on the "Advanced" button.)

When active, this mode uses only the primary MLO context for synchronization. The Primary MLO context is the first one in the list of contexts for each task. Currently, you will need to manually order the context string to change the primary context, by editing **Contexts** edit box on the **General** task option section.

#### **Projects**

If option **Assign task to corresponding project category** is set the tasks will be categorized in Outlook according to the project they belong to. The Outlook category with the name of the project



this task belong to will be created and assigned to this task in the Outlook after sync. This Outlook category can be also created with a prefix if option **Add prefix for "Project" categories** is set. The default is "Prj:", but you can change this by typing a different string into the text box.

**Note:** *The "primary project" for a task in MLO is always the first parent in the tree that is flagged as a project. If a task has three ancestors flagged as projects, that task belongs to three projects. However only the first ancestor is sent to Outlook as a category.*

As an additional option you can check **"Assign MLO projects to this Outlook category only:"**. This will force all tasks flagged as projects to be brought into a special reserved Outlook category only. The default Outlook category to be used for this purpose is "Projects", but you can also change this by typing a different category name into the text box.

**Note:** *This option takes precedence over any other category related features, and any MLO contexts assigned to the project will not be added to the Outlook category when this mode is active.*

**Note:** *When this option is active, ALL projects are synchronized to Outlook even if they have uncompleted descendant tasks or are in "closed contexts" and would normally be hidden by the "Remove tasks from Outlook not visible in MLO To-Do List" setting described in section 2.3.2.2.*

**Note:** *This mode exists to support the Outlook GTD™ Add-in tool and other tools that leverage this sort of setup.*

**Note:** *If both contexts and projects are being synchronized to Outlook categories, either projects or contexts must use a prefix. This ensures that MLO can detect whether a previously unseen Outlook category is a new context or a new project.*

#### 9.2.8.2.3.4 2.3.4 Priority Mapping Tab

Priority is a computed property in MLO. Therefore, it cannot be modified outside of MLO, but it is nevertheless very useful information outside of MLO. MLO allows multiple ways to send the priority information over to Outlook. Each mode can be enabled or disabled separately.

Any changes that you make to task priorities in Outlook will be ignored.

If you want MLO priorities to be sent to Outlook, check the first checkbox on this tab: **“Map MLO task priority to Outlook”**. You can choose to use Outlook's Low/Normal/High priority for very general priorities, or/and you can use MLO priorities to create multi-level numbered priorities in Outlook.

If you check **“Map MLO priority to Outlook's Low/Normal/High priority”**, MLO tasks will be assigned Outlook priorities as follows (depending on the current To-Do ordering method):

**Outlook Priority**  
High

**Computed Score Mode**  
Priority > 3

**Hierarchical Mode**  
Items marked as Weekly

Medium	1.0 <= Priority <= 3	Goals in MLO Top items on the MLO to-do list
Low	Priority < 1.0	Items in the end of the MLO to-do list

If you check “**Encode MLO task priority into the Outlook task subject**”, you can choose from two optional encoding methods. The first method assigns simple three-digit priorities (001, 002, 003.....100...xxx). The second assigns a letter followed by a two-digit number (A01, A02, A03.. A10, B01, B02..B10, C01....xxx). These Outlook priorities are assigned to the MLO tasks by walking the MLO To-Do list in linear order. The first ten tasks from this list get A01-A10 (or 001-010), the tasks #11-20 from the To-Do list get B01-B10 (011-020), etc.

You can also choose the format and location of the encoded priority. It can be placed at either the beginning or end of the task subject, and can be surrounded by bullets or tildes. Thus, if you have the task “Weekly review” which receives an encoded priority of A01, you can use the dropdown box to determine whether the task's name will be changed to “•A01• Weekly review”, “Weekly review •A01•”, “~A01~ Weekly review”, or “Weekly review ~A01~”.

#### 9.2.8.2.3.5 2.3.5 User defined fields Tab

Many MLO properties do not map naturally to the built-in Outlook fields. Those that do are mapped as shown in the following table (and are mapped bidirectionally, if you are using bidirectional synchronization). This mapping is done automatically in all modes.

Outlook Field	MLO Field
ID#	Outlook ID#
Subject	Title
Due Date	Due Date
Start Date	Start Date
Categories	Contexts
Notes	Note
Complete	Status

You can choose to map additional MLO properties by checking “**Fill the following User Defined Fields in Outlook:**”. When you check this option, the fields listed in the box will be created in Outlook as User Defined Fields (UDFs) and mapped to the matching task properties in MLO.

**Tip:** UDF fields will not show up in normal Outlook views, but will be available for advanced users creating their own views. To view these UDF fields in Outlook:

1. Set the UDF option in MLO.
2. Sync MLO > Outlook (or MLO <--> Outlook).
3. Open the folder in Outlook to which you synced the MLO data.
4. Right click on the header row of the table in Outlook and select "Field chooser".
5. Select "User-defined fields in folder" from the combo box.
6. Drag the needed MLO fields to the Outlook table header row.

#### 9.2.8.2.3.6 2.3.6 Tab Buttons

The following buttons appear on all tabs, and perform the described functions:

**OK** – Exits the settings dialog and saves the selected settings.

**Cancel** – Exits the settings dialog without saving any changes.

**Preset modes** – Lets you change to any of the three preset modes, as described in section 2.3.1.

**Import** – Allows you to import from a file a set of settings created by another user.

**Export** – Allows you to save your current settings to a file for use by other users.

### 9.2.8.3 3. Notes and Troubleshooting

#### 9.2.8.3.1 3.1 Changing MLO Outlook sync settings after sync operation

It is recommended to use the MLO --> Outlook sync action right after changing any critical Outlook sync settings in MLO. Otherwise it can cause the resynchronization between MLO and Outlook tasks. MLO will display this recommendation after you change the critical Outlook sync settings.

For example: if you want to change the Outlook sync settings after several MLO <--> Outlook sync operations this is currently the most stable method:

1. Sync MLO <--> Outlook with the OLD (!) settings.
2. Change the settings.
3. Sync MLO --> Outlook (!) with the new settings.
4. Start MLO <--> Outlook sync (using the new settings).

#### 9.2.8.3.2 3.2 Changing Outlook folder after sync process

3.2.1 If the Outlook folder was just renamed or moved inside the current pst file, MLO will detect this situation and the sync process will continue with no changes.

3.2.2 If you change MLO sync setting to completely different Outlook folder, then all MLO tasks will be disconnected from Outlook. So, after synchronization with new Outlook folder, all existing MLO tasks will be considered as new tasks and will be processed according to the selected sync action

#### 9.2.8.3.3 3.3 Recurring task in both places MLO and Outlook

It is not recommended to set a task as recurring in both MLO and Outlook. Please set the items as recurring in only one Program. Failure to do so will result in duplicated tasks and unexpected results during the sync process.

#### 9.2.8.3.4 3.4 Deletion of a task in Outlook which has subtasks in MLO

If you delete a task in Outlook which has subtasks in MLO, all these subtasks are placed in a <NewOutlookTasks> project after sync, because MLO does not know where these subtasks should be linked after deleting the parent.

#### 9.2.8.3.5 3.5. How backup and restore of your Outlook tasks could affect MLO sync

From the MLO FAQ:

*Q: Outlook sync trashed my outline! All my tasks are in MLO <NewOutlookTasks> project again.*

A: Here is the situation: You have copied all your Outlook tasks to MLO, created the outline there and everything worked well for some time. But after one of the sync all of your outlined tasks appeared in the <NewOutlookTasks> again.

The reason is that one day you copied all your Outlook tasks into a backup Outlook folder then deleted the original tasks and restored them from this backup folder. While restored tasks look identical to you, they look different to MLO now. This is because the IDs of the tasks have been changed. MLO uses only internal Outlook task IDs to identify tasks for sync. Thus, during the sync, MLO deleted all your tasks in the outline and copied "new" Outlook tasks to the default project. You can always identify what happened during sync, by reviewing Outlook sync log file (link to it is placed in "Setup Outlook Sync" dialog).

#### 9.2.8.3.6 3.6 The MLO Sync Log

If you have unexpected problems during synchronization, you can go to File | Setup Outlook sync and click on "Open sync log". This will display a log of all sync activity, which can be used in troubleshooting the problem.

#### 9.2.8.3.7 3.7 Misc Notes

##### **Start Date without Due Date.**

MLO allows you to set the Start Date of a task without setting a Due Date. Outlook, however, does not support tasks which have a Start Date but do not have a Due Date. To resolve this situation, a special date, 12/31/2900, is set for the Due Date in the Outlook task after sync from MLO. This date is interpreted as an "empty date" when the task is synced back from Outlook to MLO.

## 9.3 Input parsing

MLO can parse or interpret the text you enter in some text input fields. For example you can enter "in 30 min" or "next Friday at 2pm" in date and time pickers.

In the Rapid Task Entry dialog, you can type "Call Bob about the party tomorrow at 3pm remind 10 min in advance". The task "Call Bob about the party" will be added to the outline with corresponding parameters parsed from the rest of the input.

You can also parse the task caption entered to the task list if you press **Alt+Enter** instead of Enter.

### Parsing input in date time pickers

Date time pickers like **Start**, **Due** and **Reminder** can parse user's input and convert it to valid date and time. Days of the week and months can be used in English and your current locale.

Here are the examples of valid input which can be converted to date and time:

tomorrow 3pm  
 in 5 days  
 Friday (nearest Friday in future)  
 next Friday (next Friday after nearest Friday in future)  
 Tue 11:20  
 Jan26  
 August 26th  
 Nov 26 08  
 in 3 weeks 2pm  
 in 3 weeks Fri  
 in 30 min  
 in 2 months  
 today in 1h 25 min  
 next year  
 3-26-2008  
 26-3-2008

### Parsing input in Rapid Task Entry dialog and Outline

If you want MLO to parse date and time from your input you should enter your tasks using the following pattern:

**<What?> <When?>**

Examples:

Organize party with my friends 5/22  
 Call Jim tomorrow 4pm  
 Prepare report for Bob 15:10 22/5

**Note:** Parsing is deactivated in Rapid Task Entry dialog by default. To activate it you should open this dialog, click **Options** button and check **Parse input like...** check box.

**Note:** Date and time is parsed according to the rules applied for date time pickers described above.

**Tip:** use **-s** or **-start** to put the date only in the start date field when parsing in RTE or the Outline: "Call Bob tomorrow -s"

**Tip:** use **-d** or **-due** to put the date only in the due date field when parsing in RTE or the Outline: "Send report -due in 5d"

**Tip:** If MLO fails to parse your input correctly press **Ctrl+Z** in the main window to return the original text to RTE change the text and try again.

### Reminder

If you add reserved words "remind" or "reminder", or the abbreviation "rmd" to the phrase, the reminder will be set in MLO.

The pattern:

<What?> [<When?>] remind[er] | rmd [<When?>]

Examples:

Organize party with my friends May 22 reminder May 21 3pm

Call Jim in 3 days at 4pm remind 10 min in advance

Send report to Bob in 3 days remind me tomorrow 2pm

Call Jim tomorrow at 4pm remind me

Send report rmd 3pm

### Context

If you add reserved words "context" or "@" to the phrase the contexts will be added to the task. The contexts should be separated by semicolons (;)

The pattern:

<What?> [<When?>] [remind[er]] [<When?>] [context | @] <context1>; <context2>; <context3>

Examples:

Call Jim tomorrow context @office; @calls

Send report in 3 days remind tomorrow 10:00 @ ProjectX

**Tip:** If the context starts with "@" you can skip the reserved words. In this case the first word which starts with "@" is interpreted as a context.

Example:

Call Jim tomorrow @office; @calls

**Tip:** you can use the +@ switch to add contexts to the task (not replace them). Example: "Call Bob +@ phone" or "Buy ticket +@ internet"

### More complex inputs

You can use short and long week day names and names of months in English or in your current locale. You can also use phrases like "today", "tomorrow", "next Friday", "in 3 weeks", "in 4 weeks Fri", "in 3 years", "in 2 months 1 week 4 days" etc. You can use abbreviation: d=day(s); w=week(s); m=month(s) or = minute(s); min=minute(s); h, hr, hrs = hour(s).

Examples:

Send report next Tue 11am

Send report in 3 weeks Monday 15:30 remind me tomorrow 10am

Send report Jan 10

Send report February8 2009 context

Send report in 1 month 2 weeks 1 day @ ProjectX; Reports

Send report in 1 m 2 w 1 d

Send report remind me in 3 hrs

### Reserved words

MLO tries to interpret your input and separate reserved words from the task caption. However it is not always possible. For example if you use numbers in the task caption, it may be interpreted as a date, or

you may want to use reserved words "*reminder*", "*context*" etc. If MLO fails to correctly parse your entry, use quotation marks (") to separate you task caption from parameters that should be parsed.

Examples:

*"Inform about meeting with Bob tomorrow 16:00" tomorrow at 16:00 remind me 10 m*

*"Send next reminder to Jim" tomorrow*

The text inside quotation marks is not parsed and placed in the task caption.

Complete list of reserved words:

- 1) The week day names (short and log) in English and in your current locale (*Mon, Monday, .. Sun, Sunday*)
- 2) Names of months (short and log) in English and your current locale (*Jan, January... Dec, December*)
- 3) Numbers (*0, 1..9*)
- 4) The following words:  
*context, @, remind, reminder, next, in, after, before, day, days, d, month, months, m, year, years, y, week, weeks, tomorrow, w, am, pm, p, h, hr, hrs, hours, hour, minute, minutes, min, mins, today, now*

### Additional parsing switches

Additional parsing switches can be used in Rapid Task Entry or Outline parsing

Additional parsing switches:

- i1 -i2 ... -i5 : set Importance for the task 1=min .. 5=max
- u1 -u2 ... -u5 : set Urgency for the task 1=min .. 5=max
- e1 -e2 ... -e5 : set Effort for the task 1=min .. 5=max
- t<time> : set time required for the task. Examples -t10; -t2h15min
- tmax<time> : set time required max for the task
- l<time> : set lead time for the task. Example: -l2d; -l3d15m
- s or -start : the date will be placed in the Start field
- d or -due : the date will be placed in the Due field
- h : hide task in todo
- o : complete subtasks in order
- p : set lsProject option for the task
- f : set Folder option for the task
- g : set Goal option for the task
- fl<FlagName> : set flag for the task. Example: "Buy umbrella -flGreen"
- c<Color> : set font color for the task
- toprj<ProjectName> or -toprj=<ProjectName> : move task to a project. Example: "Paint wall -toprjHome"
- tofld<FolderName> or -tofld=<FolderName> : move task to a folder
- to<TaskName> or -to=<TaskName> : move task to make it a subtask of specified task.
- +@: add contexts to the task (not replace). Example: "Call Bob +@ phone"
- star or -\* : set starred to the task. Example: "Call Mike tomorrow -star"

*Example. Type this in the outline and press Alt+Enter when in-place editor is active:*

*"Call Katrin -t10 tomorrow 3p remind me 15 min in advance @calls -i1 -e4 -cr"*

*As a result of the parsing a task with the following parameters will be added to your outline:*

*Caption: "Call Katrin",*

*Due Date: tomorrow 3:00pm,  
Reminder 2:45pm,  
Context: @calls,  
Time Required 10min,  
Importance Max,  
Effort: More,  
Color: Red.*

#### **Parsing task caption in the Outliner**

You can benefit from input parsing in the Task Outliner as well. To parse the task caption entered in the Outliner, press **Alt+Enter** while you are in in-place editor mode. The task caption will be parsed according to the rules described above.

***Tip:** If MLO fails to parse your input press Ctrl+Z several times to return to the initial caption of the task.*

#### **See also**

[The Rapid Task Entry Dialog](#)  
[Timing & Reminder](#)

## **9.4 Drag'n'Drop**

Drag & Drop operations can be used in MyLifeOrganized.

#### **Drag & Drop inside MLO.**

You can Drag & Drop MLO tasks from one branch to another. Depending on the [options](#), the Contexts of the task can be changed according to the new parent.

#### **Alternative Drag & Drop**

You can use the right mouse button for alternative Drag & Drop operations: Add to dependency and Add links to notes. Just start the Drag process with the right mouse button and select the option from the menu after the Drop.

#### **Drag & Drop from Microsoft Outlook to MLO.**

You can Drag & Drop items like e-mails, tasks, appointments etc from MS Outlook to MLO tasks. The notes of the Outlook item are placed in the MLO task notes, together with additional parameters and a link to the original item in Outlook. Multiple Outlook items can turn into multiple MLO tasks.

***Note:** if there are Outlook security warnings displayed during Drag & Drop operations then download the redemption library from [this location](#) and unzip it to the same folder where mlo.exe is installed.*

#### **See also**

[Actions on Tasks](#)  
[Outliner](#)



[Options:Behavior](#)

## 9.5 The Rapid Task Entry Dialog

It is very handy to use the Rapid Task Entry dialog to quickly add tasks to MyLifeOrganized while you are working in other Windows applications. Rapid Task Entry can be configured to be accessed from the MLO tray icon and via a hotkey. This dialog is also always accessible from MLO's main menu: View > Rapid task entry window.

Text entered in Rapid Task Entry can be parsed to set specific options of a task before placing it in MLO. For example if you enter "Call Jim tomorrow 3pm remind me 10 min in advance", the task "Call Jim" will be added to MLO with the specified date, time and reminder. See [Input parsing](#) for more details.

### To enable the Rapid Task Entry in MLO tray:

1. Open the application's **Options** dialog by selecting **Tools > Options...** from the menu..
2. Select the **Rapid Task Entry dialog** option page in the options tree on the left.
3. Check the **Enable rapid task entry dialog from tray icon** check box.

*Note: for advanced dialog options see [Options: Rapid Task Entry Dialog](#)*

### To activate the Rapid Task Entry dialog from tray:

1. This function must be enabled as described above.
2. Now Right-click on MLO's system tray icon to open the tray menu.
3. Select **the Rapid task entry...** menu item.

*Tip: You can assign a hotkey to activate the **Rapid Task Entry dialog** at any time. The default hotkey **Ctrl+Shift+M**, is already set for you, but can be changed.*

### To select a default task parent

To select a default task parent for your task entry, click the **Parent** button and choose a task from the **Select Task** dialog.

### Advanced options.

Click "Options" button to open advanced settings for Rapid Task Entry dialog which are described below.

The **Rapid Task Entry** dialog works in two modes **Multiple task entry** and **Single task entry**.

### To select Multiple task entry mode

Check the **Multiple task entry** check box

In this mode, each text line will be interpreted as a separate task when you press the **Add task(s)** button. You can use indentation to create subtasks.

#### To select Single task entry mode

Uncheck the **Multiple task entry** check box

In this mode, only one task will be added to the MyLifeOrganized application when you press the **Add task** button. If the text you entered has more than one line, the first line will be used for the task name and the entire text (including the first line) will be placed in the task note.

#### To enable parsing of the input

To enable parsing of the input, check **Parse input like....** The input "Call Jim tomorrow 3pm remind me 10 min in advance" will be parsed before adding the task to MLO. See [Input parsing](#) for more details.

#### To inherit parent Contexts

If you want the entered task(s) to inherit the Contexts of the parent task, check the **Inherit parent Contexts** check box. If you uncheck this option, you will be able to specify Contexts for the entered task(s).

#### See also:

[Options: Rapid Task Entry Dialog](#)  
[Input parsing](#)

## 9.6 Alternative complete

Alternative complete is a way to complete a task with some additional actions.

To use alternative complete instead of simple task complete just hold down the Ctrl key while you check the task with a mouse click or with the space bar.

Right now the following additional actions are performed on alternative complete:

- 1) A completed copy of the task is created instead of the original task completion
- 2) The original task is moved to the end of the branch (if you completed it in the Outline) or to the end of the current list (if you completed it in the To-Do).

**Note:** *These additional actions are useful if you are using the Autofocus task management system (by Mark Forster) or another system which requires these actions.*

#### See also

[Actions on Tasks](#)

## 9.7 Printing and Reporting

You can print the tasks from the task list. The current [view](#) is used to generate print report.

**To print tasks:**

1. Select **File > Print** from the menu
2. In the **Print** dialog, select the **Print template** you want to use
3. In the **Print what**, select **Current selection** or **All tasks in view**
4. Click **Print** button

***Tip:** If you want to print only expanded items in the outline select **Expanded only** check box*

***Tip:** You can enter a custom title for your report in **Report Title***

***Note:** Before printing, each report is saved to a file. The default file name is MLOPrint.htm and you can change this name in the **Output file** edit box.*

If you click **Open in browser**, the current report will be opened in your default browser. Depending on the print template you have selected you may setup the report in the browser and use the browser's print functionality to print it.

Advanced options are available if you click **Advanced** button. You can select the information you would like to include to your print report.

To limit the number of lines to be printed for each task notes select **Limit notes to XX lines** check box.

***Note:** Lines are defined by the Return character. When typing a note, press Enter to start a new line.*

The **Reset template** button will restore the default print templates from resources. Press this button if you edited the templates and want to revert all your changes to default.

The print templates are placed in a **Reports** sub folder:

**Outline Style.mrpt** - print template for Outline style reports

**Memo Style.mrpt** - print template for Memo style reports

You can use existing templates as an example to create your own print templates. If you place your templates into the **Reports** sub folder, they can be used for printing.

**See also**

[Import/Export](#)

[Printing PocketMod](#)

## 9.8 Printing PocketMod

MyLifeOrganized can generate PocketMod-style reports. PocketMod is a piece of paper you can cleverly fold into a small booklet. Each page of this booklet can contain different information you select.

[More info about PocketMod.](#)

**How to print PocketMod using MyLifeOrganized**

1. Select menu *File > Print PocketMod...*
2. From the list on the left select a PocketMod profile or create a new one by clicking New.. button on

- the top.
3. Customize each page of the PocketMod on the right by clicking on the Setup... link for appropriate page.
  4. Click "Preview & Print" to open your PocketMod in MS Word.

When you customize PocketMod pages you can select from the following options:

*Cover*: prints a cover page with name of the MLO owner.

*Blank*: prints blank page

*To-Do View*: prints the current To-Do view with specified parameters. You can split a view on several PocketMod pages by selecting "Print View Page#" parameter which specifies what page should be taken from the view. So you can place View Page# 1 on the PocketMod Cover and View Page# 2 on another PocketMod page.

**Note:** *the settings for the views split across pages should be identical so that pages are split correctly.*

*Outline/One task*: prints selected task with its notes or branch of the outline.

*Widget*: prints different widgets like *Lines* or *Day Hourly* schedule. Widgets can be also imported from files. RTF is used to create widgets. See example of PocketMod widget in this file:  
<MLO>\Reports\PocketMod\Weekly.rtf

**Note:** *The Microsoft Word application is needed to print MyLifeOrganized PocketMod*

**Tip:** *If your PocketMod does not fit into the page, click Global Settings and select Report template (for A4 or Letter), number of lines printed on each PocketMod page and width of each line in pixels. Adjust these parameters for the PocketMod to fit your page.*

**See also**

[Printing and Reporting](#)

## 9.9 Archiving

Archiving is a way to backup or delete old completed tasks from MyLifeOrganized.

Depending on the configuration, completed tasks that are over a certain age can be moved to an archive data file, copied to an archive data file or deleted permanently.

Archiving can be run [manually](#) or [automatically](#) according to a schedule you set in the [AutoArchive](#) feature.

**See also**

[Archiving Manually](#)

[Archiving Using AutoArchive](#)

[AutoArchive settings](#)

[Advanced Backup of Data Files](#)

### 9.9.1 Archiving Manually

Manual [archiving](#) allows you to run archiving at any moment for the selected branch or for the entire outline.

#### How to run archiving manually

1. On the **File** menu, click **Archive....**
2. Configure manual archive settings (see below)
3. Click OK

Configuring manual archive settings:

#### Archive all tasks according to default settings

Set this option to archive the entire outline according to [default AutoArchive settings](#). Click the **Default Archiving Settings** button to configure these settings.

#### Archive tasks from selected branch only

Set this option to archive only the selected branch according to custom archive settings (see below).

#### Clean out tasks completed before <date>

This option sets how old completed tasks must be, to be archived. The task must have been completed before this date to be archived.

#### Clean out completed tasks only with all subtasks completed

Check this option if you want to archive only the tasks for which all subtasks are completed. Otherwise, a task with uncompleted subtasks will be ignored during archiving even if it is old enough for archiving.

#### Include tasks with "Do not archive branch" checked

This overrides the option **Do not archive tasks in this branch** for a task and archives it anyway. See [Archiving Using AutoArchive](#) for more details on the "do not archive branch" option.

#### Copy old tasks to archive:

Specify a data file where you would like to copy or move old tasks.

#### Remove old tasks after copy (i.e. move to selected archive)

If you set this option, the original archived tasks will be removed from the current data file after being copied to the archive file.

If you clear this option, archiving will just copy old tasks to the selected archive file. This could be useful if you want to review archived tasks before removing them from the current data file.

#### Permanently delete old tasks

If you select this option old tasks will be deleted permanently during archiving.

#### See also

[Archiving Using AutoArchive](#)

### 9.9.2 Archiving Using AutoArchive

MLO can perform [archiving](#) automatically, every N days. To activate this feature, you should setup AutoArchive settings.

### How to setup AutoArchive settings

1. On the **Tools** menu, click **Options**, and then click the **AutoArchive**.
2. Check **Run AutoArchive every N days**
3. Setup other AutoArchive settings (see [AutoArchive settings](#) for more details).
4. Click OK

**Note:** Once configured, the AutoArchive procedure starts on the specified day, a few minutes after you open the MLO data file.

If you do not want a task and all its subtasks to be archived, check option **Do not archive tasks in this branch** for this task:

### How to set "do not archive branch" option

1. On the **Task** menu, click **Advanced** and then click **Properties...**
2. Select the **AutoArchive** tab
3. Check **Do not archive tasks in this branch**

**Note:** archiving is not performed in the following cases:

- 1) Completed subtasks from open projects. Complete the project to archive its completed subtasks
- 2) Completed subtasks of the recurrence tasks
- 3) Completed tasks if other tasks depend on these tasks with delay

### See also

[Archiving Manually](#)  
[AutoArchive settings](#)

## 9.10 Using the Command Line

You can perform certain operations on your MLO data files or tasks by using the command line.

### To work with MLO from the command line:

1. To display the list of available commands run the following command-line command:

**mlo.exe /?**

The following command-line syntax for MLO is displayed in a dialog box.

```
mlo.exe [<FileToOpen>] [-QuickSync] [-PocketMod="<PocketMod Profile>"] [-task={TASKGUID}] [-zoom={TASKGUID}] [-AddSubtask="<TaskCaption>"] [-Parse] [-saveXML="<FileName>"] [-saveML="<FileName>"] [-console] [-help|-?]
```

The parameters represent the operations you can perform. The following parameters are available:

Parameter	Meaning
<FileToOpen>	Opens the specified MLO data file in MLO. The file must be in MLO binary or MLO XML format.  <b>Note:</b> You can specify a relative or absolute path to the file.
-task	Selects the task with the specified <a href="#">GUID</a> in the Outline. Put the <FileToOpen> parameter before this parameter to specify the MLO

	<p>data file that contains the task. Make sure that the task's GUID is enclosed in braces: { }.</p> <p><b>Tip:</b> To view a task's GUID, select the task in the Outline, right-click and select <b>Advanced &gt; Properties</b>. The <b>Task ID</b> box on the <b>System properties</b> tab displays the task's GUID.</p>
<b>-zoom</b>	<p><a href="#">Zooms in on the task</a> with the specified <a href="#">GUID</a>. Put the <b>&lt;FileToOpen&gt;</b> parameter before this parameter to specify the MLO data file that contains the task.</p>
<b>-AddSubtask</b>	<p><a href="#">Adds a new subtask</a> to the task with the <a href="#">GUID</a> specified in the <b>task</b> parameter. Enclose the name of the subtask in quotation marks. Put the <b>&lt;FileToOpen&gt;</b> parameter before this parameter to specify the MLO data file that contains the task.</p>
<b>-Parse</b>	<p>Use <a href="#">parsing</a> when adding new subtask with parameter -AddSubtask</p>
<b>-QuickSync</b>	<p>Executes sync operation as if you press "Tools &gt; Synchronize" in MLO.</p> <p>You can use this command to setup periodical sync in Scheduled Tasks.</p> <p>Example: mlo.exe D:\MLO\home.ml -quicksync -console</p> <p><b>Notes:</b> MLO v.4+ includes new cloud auto-sync functionality. It is not needed to use this parameter with cloud sync anymore</p>
<b>-PocketMod</b> ="<ProfileName>"	<p>Creates and opens for preview selected PocketMod profile.</p> <p>Example: mlo.exe D:\MLO\home.ml -pocketmod="ActiveTasks"</p>
<b>-saveXML</b>	<p>Save the MLO data file specified by <b>&lt;FileToOpen&gt;</b> as a new MLO XML file. Enclose the file name of the new XML file in quotation marks.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>You must specify a different file name for the new file. MLO will not overwrite any existing files.</li> <li>If you want to save the file to a folder other than current folder, specify an absolute or relative path to the file.</li> </ul>
<b>-saveML</b>	<p>Save the MLO data file specified by <b>&lt;FileToOpen&gt;</b> as a new MLO binary file. Enclose the file name of the new file in quotation marks.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>You must specify a different file name for the new file. MLO will not overwrite any existing files.</li> <li>If you want to save the file to a folder other than the MLO folder, specify an absolute or relative path to the file.</li> </ul>
<b>-console</b>	<p>Performs the command in console mode (without displaying the MLO user interface). If this command is specified then MLO exists after processing the commands.</p>

<b>-help</b>	Displays the MLO command-line syntax dialog box.
--------------	--------------------------------------------------

**Examples:**

```
mlo.exe MyDataFile.ml -task={213DCA87-6D2E-254D772616FA} -  
AddSubtask="NewSubtask #1"  
mlo.exe MyDataFile.ml -SaveXML="d:\path\MyXML.xml" -console
```

2. Run the appropriate command.

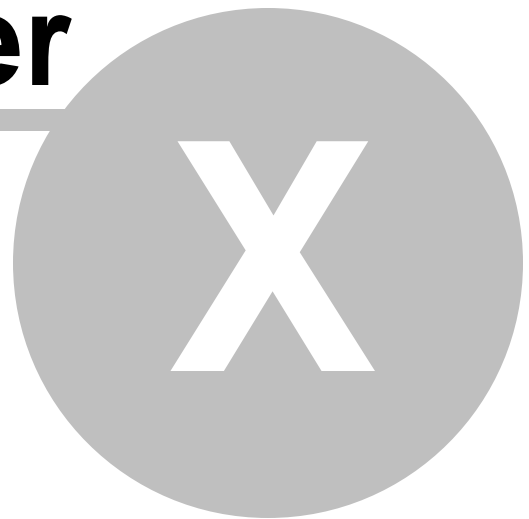
The following ERRORLEVEL values can be returned.

<b>ERRORLEVEL</b>	<b>Meaning</b>
<b>0</b>	The command was executed successfully.
<b>1</b>	The command failed because it contains an invalid argument.
<b>2</b>	The command failed because an existing file was specified in the -saveXX command. MLO will not overwrite any existing files.
<b>3</b>	The command failed because a data-writing error (for example, a "disk full" error) occurred.
<b>100</b>	The command failed because an error other than a data-writing error occurred.



# Chapter

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## 10 Options

All MyLifeOrganized settings are accessible in the **Options** dialog.

**To open the MLO options dialog:**

1. Select menu **Tools > Options...**
2. Select the option page you need in the tree on the left part of the dialog.

### 10.1 Current MLO data file

The Current MLO Data File Options are stored in the current MLO data file. In other words, you can set different options for different \*.ml files.

#### 10.1.1 Appearance

This options page allows you to setup the controls which should be visible in MLO. These parameters are stored in the current MLO data file.

<b>Importance/Urgency</b>	Check to show <b>Importance</b> and <b>Urgency</b> controls in the <b>General</b> property section
<b>Contexts</b>	Check to show all Contexts related controls: Contexts tab, Contexts in the <b>General</b> property section
<b>Goals</b>	Check to show the Goals group box in the <b>General</b> property section
<b>Timing &amp; Reminder</b>	Check to show the <b>Timing &amp; Reminder</b> property section
<b>Review</b>	Check to show the <b>Review</b> property section
<b>Effort</b>	Check to show the <b>Effort</b> property section
<b>Project</b>	Check to show the <b>Project</b> property section
<b>Dependency</b>	Check to show the <b>Dependency</b> property section
<b>Task Format</b>	Check to show the <b>Format</b> property section
<b>Task Statistics</b>	Check to show the <b>Task Statistics</b> property section

**See also**

[Understanding of Main Window](#)

#### 10.1.2 Automatic Formatting

Here you can setup [Automatic Formatting](#) rules.

**See also**

[Automatic Formatting](#)

#### 10.1.3 To-Do List Ordering Options

This options page allows you to adjust the parameters used in the task list [ordering algorithm](#) when [Computed-Score](#) is used to sort tasks. These parameters are stored in the current MLO data file.

**Weight factors** (Due date, Start date, Weekly goal)

These settings control how greatly each parameter affects the position of the task in the task list. The higher you set a weight, the more influence the parameter will have on the list ordering.

**Use increased priority for overdue tasks** - check this option to boost priority of overdue tasks

**Prioritization method**

This option represents which slider (Importance, Urgency or both) will affect the position of the task in the task list.

**Restore all Tasks to normal Importance and Urgency...**

Click this button to reset Importance and Urgency parameters of all tasks to the Normal value.

***Note:** The **Restore default** button will reset all Computed-Score Priority parameters to their default values.*

For more details on how these parameters are used in the to-do list ordering please refer to the topic on [Computed-Score Priority](#).

**See also**

[Understanding Task List Ordering](#)

[To-Do List](#)

**10.1.4 To-Do List Format**

The To-Do list format options page allows you to set up the parameters which are used in formatting the tasks in the To-Do list. For example, you can start each task in the To-Do list with its project name.

**To encode the project name in To-Do list tasks**

1. Choose **Tools > Options** from the menu and click on **To-Do list format** in the options tree on the left.
2. Check the **Encode additional information for tasks on the To-Do list** check box.
3. On the **Projects** tab, set the **Encode project name** check box.
4. Select whether you want the Immediate or Top level project to be displayed for tasks.
5. Enter the start and end string that will be used around the project name to separate it from the task name.
6. Select **Prefix** if you want the task name to be preceded by the project and **Postfix** if you want the task name to be followed by the project name.
7. Click OK.

**To encode the project path in To-Do list tasks**

1. On the **To-Do list format** options page, check the **Encode additional information for tasks on the To-Do list** check box.
2. On the **Task path** tab, check the **Encode task path** check box.
3. Enter the task path depth, character limit. and separator character.
4. Enter the start and end string that will be used to separate the task path from the task name.

5. Select **Prefix** if you want the task name to be preceded by the path and **Postfix** if you want the task name to be followed by the path name.
6. Click OK.

*Tip: In the **Example** section, you can review how tasks will be displayed in the To-Do list with the current settings.*

**See also**

[The To-Do list](#)

### 10.1.5 WiFi Synchronization

WiFi Synchronization allows you to synchronize MLO-Windows with MLO on mobile devices (such as iPhone) connected to the same WiFi network. The data transfer performed to your device directly. You can sync only if you located near your PC with MLO-Windows running on it.

This options page will help you to pair with your mobile device. It displays the current status of WiFi sync pairing for the opened file and additional information and instructions.

**See also:**

[WiFi Synchronization](#)

[MyLifeOrganized Cloud](#)

### 10.1.6 AutoArchive

You can setup AutoArchive settings to instruct MLO to perform [archiving](#) of old completed tasks automatically every N days .

#### **Run AutoArchive every NN days**

Check this option to enable the AutoArchive feature.

#### **Prompt before AutoArchive runs**

Check this option if you want MLO to show a message before archiving begins.

#### **Clean out tasks completed more than XX ago**

This option shows how old completed task should be, to be archived.

#### **Clean out completed tasks only with all subtasks completed**

Check this option if you want only tasks with all subtasks completed to be archived. Otherwise, a task with uncompleted subtasks will be ignored during archiving even if it is old enough for archiving.

#### **Copy old tasks to archive:**

Specify a data file where you would like to copy or move old tasks.

#### **Remove old tasks after copy (i.e. move to selected archive)**

If you set this option the original archived tasks will be removed from the current data file after copy to archive file.

If you clear this option, archiving will just copy old tasks to the selected archive file. This could be useful if you want to review archived tasks before removing them from the current data file.

#### **Permanently delete old tasks**

If you select this option, old tasks will be deleted permanently during archiving.

**Note:** *Once configured, the AutoArchive procedure starts on the specified day, 3 minutes after you open the MLO data file.*

**See also**

[Archiving](#)

[Archiving Using AutoArchive](#)

[Advanced Backup of Data Files](#)

### 10.1.7 Password protection

You can enter a password to open current MLO data file.

**Note:** *it is not possible to restore your password for the MLO data file or open this file without password.*

## 10.2 General Application Options

The General Application Options are stored in the Windows registry and take effect in all instances of the MLO application.

### 10.2.1 Themes and Formatting

On this options page you can choose themes and formatting for the MLO application. These parameters are stored in the Windows registry and are in effect for all MLO instances.

**Themes**

Theme settings are used to change font and color for standard elements like Tasks, Projects, Folders, Selection, Notes, Outline etc. You can select one of the predefined themes or create your own.

**Tip:** *To format tasks using rules based on their properties, use [Automatic Formatting](#)*

**Tip:** *To change the format of individual tasks, use [Custom Formatting](#)*

**Date and Time Format**

This option represents the format of the date and time as it is shown in the task tree. You can select different formats for different type of tasks. For example, future tasks can show the full date, while tasks scheduled for this week can show only the day of the week.

The format string is used to define the date and time format. For example: *d mmm yy ddd (R)*  
Here are the various date time format strings:

- d** Displays the day as a number without a leading zero (1-31).
- dd** Displays the day as a number with a leading zero (01-31).
- ddd** Displays the day as an abbreviation (Sun-Sat) using the strings given by Window' regional settings.
- dddd** Displays the day as a full name (Sunday-Saturday) using the strings given by Windows regional settings.

**dddd** Displays the date using the short format given by Windows regional settings.

**dddd** Displays the date using the long format given by Windows regional settings.

**d**

**m** Displays the month as a number without a leading zero (1-12).

**mm** Displays the month as a number with a leading zero (01-12).

**mmm** Displays the month as an abbreviation (Jan-Dec) using the strings given by Windows regional settings.

**mmm** Displays the month as a full name (January-December) using the strings given by Windows regional settings.

**m**

**yy** Displays the year as a two-digit number (00-99).

**yyyy** Displays the year as a four-digit number (0000-9999).

**/** Displays the date separator character given by Windows regional settings.

**:** Displays the time separator character given by Windows regional settings.

**'xx'"/"x** Characters enclosed in single or double quotes are displayed as-is, and do not affect

**x"** formatting.

**R** Displays number of days from today in long format: "in 3 days", "– 5 days"

**r** Displays number of days from today in short format: "+3d", "–5d"

#### See also

[Automatic Formatting](#)

[Custom Formatting](#)

[Understanding the Main Window](#)

## 10.2.2 Behavior

Behavior options are used to setup MLO application behavior. All parameters listed here are stored in the Windows registry and are in affect for all MLO instances.

<b>Always show icon in system tray</b>	Check to show the MLO icon in the system tray when MLO is running.
<b>Escape minimizes the application</b>	If set, the MLO application can be minimized by pressing the <b>Escape</b> key
<b>Minimize to system tray</b>	If set, the minimized MLO application does not appear, neither in the task bar nor in the Alt+Tab list. You can activate MLO by clicking on the icon in the tray or using the MLO shortcut.
<b>Close to system tray</b>	If set, the <b>Close Window</b> icon will actually minimize the MLO application. You can still exit the MLO application by selecting menu File > Exit.
<b>One click edit mode</b>	If this option is set, you need only one mouse click to edit a task caption in the task list.
<b>Save window position</b>	If this option is set, the MLO application stores its last window position.
<b>Associate with *.ml files</b>	Associates MLO data files with the MLO application, so that double-clicking an mlo file launches MLO and opens that file.

<b>Allow multiple instances</b>	Set this option if you want to be able to run multiple instances of the MLO application. Otherwise only one instance is allowed.
<b>When Drag &amp; Drop task to a new parent</b>	You can configure to inherit Contexts of the parent task when a task is moved to another parent. If option " <i>Ask what to do with Contexts of moved task</i> " is set a confirmation dialog will be shown each time you Drag & Drop or move a task.
<b>System Shortcut Key</b>	You can select any shortcut to activate/deactivate the MLO application.

**See also**

[Understanding of Main Window](#)

**10.2.3 Auto-Save Files**

There are two modes for saving your MLO data file. These parameters are stored in the Windows registry and are in effect in all MLO instances.

**Save all changes automatically**

All your changes are saved to the data file automatically right after you made the modifications

**User manually saves the changes**

You need to click Ctrl+S to save your data file after changes as you usually do with document editors. Critical updates like synchronization are still saved automatically in this mode

**See also**

[Auto-save](#)

[Create, Open and Save MLO Files](#)

[Import/Export](#)

[Backup](#)

**10.2.4 The Rapid Task Entry Dialog**

The Rapid Task Entry dialog option (accessed from Tools > Options) allows you to set up the behaviour of the Rapid Task Entry dialog. The parameters you set are stored in the Windows registry and are applied to all MyLifeOrganized instances.

<b>Enable Rapid Task Entry dialog from tray icon</b>	Enables this advanced feature
<b>Close dialog after adding task(s)</b>	If this option is checked, the dialog will close automatically when you press the <b>Add task(s)</b> button.
<b>Stay on top</b>	The Rapid Task Entry dialog will stay on top of all other Windows applications.
<b>Clicking on tray opens Rapid Task Entry dialog</b>	If this option is checked, left clicking on the MLO system tray icon will activate the Rapid Task Entry dialog rather than open the MyLifeOrganized main window.
<b>Place additional text in task note if text entered is greater than XX characters</b>	If the name of a task you have entered in the Rapid Task Entry dialog is longer than XX characters, the task name will be truncated and the entire text will

	be placed in the task note.
<b>Inactivity transparency</b>	For Windows 2000/XP, the transparency can be set for the dialog when it is inactive.
<b>Hotkey</b>	This option allows you to change the system shortcut key, which can be used to activate/deactivate the Rapid Task Entry dialog at any time.

**See also**

[Rapid Task Entry Dialog](#)

## 10.2.5 Backup

On this page, you can configure how MLO should backup your data files.

**Perform advanced backup for each data file during saving**

Enables advanced backup functionality.

**Keep last N backups of each data file as: <file>.ml-(NN).bak**

MLO stores the last N copies of your data file, renaming them according to the given template.

For example if you set this option to 3 you will have the following files in your backup folder:

myfile.ml-(01).bak

myfile.ml-(02).bak

myfile.ml-(03).bak

In this example myfile.ml-(01).bak is the most recent file.

***Tip:** set this option to 0 to disable keeping the last N backups.*

**Backup in:**

A folder where all backup files will be placed.

**Keep daily backups as: <file>.ml-YYYY-MM-DD.bak**

MLO stores one copy of your data file for each day, renaming it according to the given template. You can select a custom folder for daily backups.

**Keep weekly backups as: <file>.ml-YYYY-(NN week).bak**

MLO stores one copy of your data file for each week, renaming it according to the given template. You can select a custom folder for weekly backups.

**Keep monthly backups as: <file>.ml-YYYY-(NN month).bak**

MLO stores one copy of your data file for each month, renaming it according to the given template. You can select a custom folder for monthly backups.

**Restore default**

Click to restore default backup settings.

***Note:** Backup settings are application related and stored in Windows registry.*



*This means that once configured they will be used for backing up all MLO data files for the current user on this computer .*

**Tip:** To recover from a backup, simply open the backup data file (\*.bak) in MyLifeOrganized application (menu: File >Open)

**See also**

[Advanced Backup of Data Files](#)

[Auto-save Files](#)

[Archiving](#)

## 10.2.6 E-mail Account

On this page, e-mail SMTP settings are configured. These settings are used to send e-mails from MLO.

## 10.2.7 Hot Keys

The **Hot Keys** section of the **General Application Options** dialog box lists the default keyboard shortcuts (hot keys) for the most common MLO functions and commands. You can customize the keyboard shortcuts by changing the default keyboard shortcuts to the keys or combinations of keys that you want to use.

**To customize the keyboard shortcuts:**

1. Select *Tools > Options > Hotkeys*
2. In the Hot Keys list, select the command or function that you want to assign a different keyboard shortcut to.
3. In the **Hotkey** box, press the key or combination of keys that you want to assign. For example, press SHIFT plus the key that you want to use.
4. Click **Modify**.
5. Repeat steps 1–3 to change the default keyboard shortcut for each additional function or command.
6. Click **Apply** or **OK** to save the change to the keyboard shortcut assignment.

**Notes:**

- You can restore the keyboard shortcut assignments to their default settings by clicking **Reset All**.
- You can remove the keyboard shortcut assigned to a function or command by selecting that function or command and clicking **Clear**.

**See also:**

[Keyboard Shortcuts](#)

## 10.2.8 Troubleshooting

This page is used to enable additional logging in MyLifeOrganized for troubleshooting and sending logs to support for investigations of possible issues.



# Chapter

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XI

## 11 Technical Support

If you have a question about **MyLifeOrganized**, you can:

1. Consult the MyLifeOrganized help and on-line documentation
2. Access our [Frequently Asked Questions](#). There is a good chance that you'll find the answer to your question there.
3. Post a message to the [MyLifeOrganized community](#). People are very friendly there and can help you with any MLO questions you may have.
4. If you can't find the answer from any of these sources, feel free to send an e-mail message to [support@MyLifeOrganized.net](mailto:support@MyLifeOrganized.net)

# Chapter

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XII

## 12 License Agreement

### **MyLifeOrganized Application - End User License**

There are two versions of the MyLifeOrganized application:

1. Free 45-day Trial Version
2. Registered version (Standard Edition or Professional Edition).

You can find out what version you have by checking the About window at Help >About menu.

Please read the license agreement below. If you disagree with this agreement, please delete all MyLifeOrganized application files from your computer.

### **Free 45-day Trial Version**

You may freely distribute 45-day Trial Version to any number of people. Any user who installs and runs the trial version is automatically subject to this license agreement.

You may not charge money for the Trial Version in excess of the distribution media and handling costs. You may not misrepresent the program origin, claim the authorship, alter the program files, and distribute the program without license file or help file. Reverse engineering, decompiling and disassembling the program is strictly prohibited.

After using the program for 45 days you may either purchase the fully functional version of MyLifeOrganized (Standard Edition or Professional Edition) or stop using the program and uninstall it from your computer's disk. Use of this software after the trial period of 45 days is in violation of international Copyright law!

### **Registered version (Standard Edition or Professional Edition)**

When you purchase the fully functional version of MyLifeOrganized, one user license is granted to you. You may choose from two editions of the application: Standard Edition or Professional Edition. You may make copies of the software for backup purposes and to install it on up to five computers, as long as only one person uses the software. This way, you may install it at home and in office for your personal use. Additional licenses are necessary if more than one person is using the program.

Along with the license to use the software you will receive free updates of MyLifeOrganized to all new minor versions in appropriate Edition. Anyone that bought the full (professional) version would get free upgrade to all new updates (including major) released within 12 months from the date of their purchase.

Please visit the MyLifeOrganized application website at [www.mylifeorganized.net](http://www.mylifeorganized.net) for additional information about acquiring the fully functional version.

### **Liability**

Although we tried to make the MyLifeOrganized application as bug-free as possible, no software is completely error-free. Descriptions of the bugs will be gladly accepted, but we cannot guarantee that we will be able to correct them.

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# Chapter

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XIII

## 13 Glossary

Listed here are terms that are commonly used in MyLifeOrganized (MLO), many of which have meanings in this context that differ from everyday usage.

***Note** that within each definition, terms that are defined elsewhere in the glossary are capitalized and colored blue.*

**Action** – A piece of work that needs to be completed to accomplish a [Goal](#).

**Child Task** – One of a group of smaller tasks that must be completed in order to complete a larger [Parent Task](#).

**Completion Percentage** – A number that is calculated for a [Project](#), based on how many [Subtasks](#) of the project are completed and how much [Effort](#) is required for each subtask.

**Context** – A particular location or situation in which a [Task](#) can be completed. A Context can also include other Contexts in the hierarchy and can have [Open/Close Schedule](#).

**Due Date** – The final date by which a [Task](#) absolutely must be completed.

**Effort** – An estimate of the amount of energy needed to accomplish a task. The amount of time needed for the task's completion can also enter into this estimate; however, MLO has a separate [Time Required](#) estimate, so the concentration here should be on the energy required.

**Export** – To save an MLO file in a format that makes it usable by another application.

**Goal** – A user's aim; the end to which [Effort](#) is directed. Any [Task](#) in the Outline can be [indicated](#) as a weekly goal, monthly goal or yearly goal. The special [Goals](#) view is designed to easily review all your goals.

**Import** – To insert tasks from a file that has been saved by another application, in a non-MLO format.

**Importance** – A judgment of how critical a [Task](#) is to the completion of its [Parent](#). In MLO, importance is not an overall rating of priority relative to all tasks. Rather, importance is set with regard to completing the immediate [Parent Task](#). Importance is also distinct from [Urgency](#). It is possible (in fact, quite common) for an unimportant task to be urgent; obviously, important tasks are not always urgent.

**Lead Time** – The number of hours or days that will be needed in order to complete a task by its [Due Date](#). Lead time is used to calculate the [Start Date](#) (due date – lead time).

**Open/Closed Schedule** – The hours during which a particular [Context](#) is [available](#) for accomplishing tasks.

**Outline** – A list of [Goals](#), [Projects](#), and other [Tasks](#) displayed in a way that shows the relationships of [Subtasks](#) to their respective [Parents](#). Starting from MLO v.4 the [Outline](#) can be filtered, sorted and grouped according to different settings and saved as [View](#).

**Parent or Parent Task** – A task which contains or includes multiple [Subtasks](#) which must be completed before the parent task is considered to be complete.

**Project** – In general terms, any [Task](#) that has [Subtasks](#). In MLO you can indicate that a certain task is

a Project by setting the [special task property](#). All marked projects are included in the [Projects](#) view.

**Start Date** – The date by which a [Task](#) must be begun in order to complete it by its [Due Date](#). Also the first day a Task will appear in the [To-Do List](#).

**Subtask** – A group of [Tasks](#) that must be completed in order for their [Parent Task](#) to be completed.

**Task** – An item of work that needs to be completed. In general terms, a task can be either a single item of work or a larger piece of work that can be broken down into easier, quicker [Subtasks](#). In MLO any task can be converted to a [Goal](#) or [Project](#).

**Time Required** - An estimate of how long it will take to complete a task.

**To-Do List** – A non-hierarchical list of [Tasks](#) that require attention. The [To-Do List](#) can be filtered, sorted and grouped according to different settings saved as [To-Do List View](#).

**Tree** – Another name of the [Outline](#).

**Urgency** – A measure of how necessary it is to complete a [Task](#) immediately. An urgent task is one that has a deadline in the near future.

**View** – A particular way of displaying a filtered, sorted and grouped [Tasks](#).

**XML** – A standard format that is recognized by various types of applications and that allows files to be shared between those applications.

**Zoom in** – To display only a single branch of the [Task Tree](#) to avoid interference from other tasks. Only items in this branch are displayed in the [Outline](#) and in the [To-Do List](#).

**Task GUID** - Globally Unique Identifier of the Task or Task ID. To see the GUID of the task select menu: Task > Advanced > Properties

Example of the Task GUID: [{F9BA410A-AB32-41BB-AE04-869F0F490981}](#)

**Workspace** - tabs on the top of the MyLifeOrganized application. The Workspaces are used to store and quick access the particular configuration for the selected [view](#), additional [filter controls](#), [zoom](#), selected tasks etc. The Workspaces can show different parts of the same data files in different views. For example, in one tab you can work on a current project in the other – view a small household chores and the third tab -handle the Inbox.



# Index

## - A -

Action Filter 41  
Actions 37  
Activation Code does not work 9  
Active Actions 37  
Advanced Filter 41  
advanced task properties 68  
alert 62  
Alternative complete 108  
archiving 110  
archiving manually 111  
AutoArchive 111  
Autofocus 108  
Automatic cloud sync 87  
automatic formatting 78  
automatic resetting of subtasks 60  
auto-save 23

## - B -

backup 20, 23  
bookmarks 36

## - C -

Cloud sync 86  
collaboration 89, 90  
Collaboration using Cloud 90  
Columns 51  
command line 112  
complete subtasks in order 58  
completed 67  
Completion Filter 41  
completion percent 65  
Computed-Score Priority 45, 46  
    more details 46  
Context 56  
contexts 70  
    creating/deleting 70  
    included contexts 71  
    open/closed hours 71  
    options 71

created 67  
creating 70  
    context 70  
    task 30

## - D -

Default outline views 29  
Delayed dependency 64  
deleting 70  
    context 70  
    task 31  
demo file 21  
Dependency 64  
do not archive task 68  
do not create a completed copy 60  
drag&drop 31  
drag'n'drop 106  
drag'n'drop from Outlook 106  
due date 59

## - E -

edit completion date 68  
effort 63

## - F -

Filter Controls 41, 43  
Filtering 41  
find 22  
flags 67  
flash drive 9  
folder 58  
fonts and color 119  
format dates 119  
formatting 119

## - G -

general options 119  
getting started 12  
Glossary 132  
goals view 58  
Grouping 45  
GUID 132

## - H -

hide task in to-do 58  
Hierarchy Filter 41  
how it works 16

## - I -

import/export 20  
importance 57  
input parsing 102, 107  
installing 8

## - K -

keyboard shortcuts 74  
    customizing 123

## - L -

lead time 59  
License Agreement 128  
logs 123  
Lost Activation Code 9

## - M -

main window 12  
Manual ordering 45  
mlo:// 35  
modified 67  
monthly goals 58

## - N -

Next Actions 37

## - O -

Online Activation Service 9  
open file 20  
open/closed hours 71  
options 116  
    appearance 116

AutoArchive 118  
automatic formatting 116  
auto-save files 121  
backup 122  
behavior 120  
email 123  
hot keys 123  
password protection 119  
rapid task entry 121  
themes 119  
to-do list format 117  
to-do list ordering 116  
troubleshooting 123  
wifi sync 118  
options of current data file 116  
Ordering of To Do list 45  
outline 26, 27  
Outline views 29, 39  
outliner 27  
outlook sync 92

## - P -

PocketMod 109  
Print 108, 109  
printing  
    reporting 108, 109  
project 65  
projects view 65  
purge completed tasks 110

## - R -

rapid task entry 107  
rearranging tasks in outline 31  
recover from backup 20  
recurring behavior 60  
registration  
    Activation Code 8  
registration for offline computer 8  
reminder 62  
removable media 9  
reoccurrence 60  
Review 65

## - S -

- search 22
- search as you type 22
- searching 22
- send logs 123
- set task as project 65
- skip occurrences 60
- Sorting 45
- Starred 68
- start date 59
- subtask 30
- Sync with BlackBerry 88
- synchronization 79
  - between work and home computers 91
  - collaboration 90
  - portable scenarios 91
  - resolving synchronization conflicts 92
  - with Microsoft Outlook 92
- synchronization conflicts
  - resolving 92
- synchronization items
  - using for collaboration 90
  - using for portable scenarios 91
- synchronization profile
  - adding 80
  - deleting 85
  - editing 85
  - exporting 85
  - importing 85
  - synchronizing data files with 83
- Synchronization profiles 80
- synchronizing data files 83

## - T -

- Tab 26
- tab delimited 20
- task 30, 31
- task effort 65
- Task Format 66
- task links 35
- task properties 56
  - assigning context 56
  - complete subtasks in order 58
  - Dependency 64

- due date 59
- effort 63
- flags 67
- folder 58
- goal 58
- hide task in to-do 58
- importance 57
- lead time 59
- project 65
- reminder 62
- reoccurrence 60
- Review 65
- Starred 68
- start date 59
- Task Format 66
- task statistics 67
- time 59
- time & reminder 59
- time required 63
- urgency 57
- tasks
  - actions 32
  - creating 30
  - creating links between 35
  - deleting 31
  - navigation 34
  - rearranging tasks in outline 31
  - working on at work and home 91
  - working on tasks on travel 91
- technical support 126
- templates 20, 21
- themes 119
- thumb drive 9
- time & reminder 59
- time required 63
- To Do list 37
  - ordering 45
- To-Do 26
- To-Do views 37, 39

## - U -

- urgency 57

## - V -

- View 26

Views 29, 34, 39

    Create 39

    Delete 39

    Export 39

    Manage 39

    Rename 39

## - W -

weekly goals 58

WiFi sync 89

window 12

Workspace 26

Workspace tabs 51

## - X -

XML 20

## - Y -

yearly goals 58

## - Z -

zoom in 34

zoom out 34



## Endnotes 2... (after index)

